

# Labour Market

# Assessment and

# Review



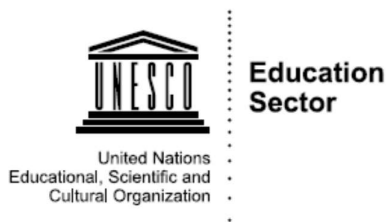
and

**Assessment of Technical and Vocational Education and  
Training (TVET), Vocational Training (VT) and Skills  
Development in Select Locations**

**SOUTH SUDAN**

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The EMPOWER project, aims to empower local civil society organisations (CSOs) and to promote active citizenship through access to relevant TVET activities, income generating opportunities, and through a CSO Funding Mechanism for South Sudan. EMPOWER is funded by the European Union and implemented by the Norwegian Refugee Council, ACROSS, BBC Media Action, Finn Church Aid, Nile Hope and the Vocational Skills Development Organisation who will work together with youth, community members and leaders, businesses people and networks, TVET/VT teachers and centre leaders, local and national authorities, CSOs and development partners.





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## Assessment of Technical and Vocational Education and Training (TVET), Vocational Training (VT) and Skills Development in Select Locations

South Sudan



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Published in 2018 by the United Nations Educational, Scientific and Cultural Organization,  
7, place de Fontenoy, 75352 Paris 07 SP, France  
and  
UNESCO Juba Office  
and  
The Norwegian Refugee Council's South Sudan office, on behalf of the EMPOWER project funded by the  
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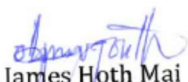
Project coordinator: Hai Tiet  
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## Foreword


This study provides an urgent need to align technical and vocational education and training (TVET), vocational training (VT) and skills development provision in South Sudan with labour market demands and needs. The sector faces many challenges in fragmentation in service delivery and aligning to what the labour market truly demands is a significant challenge. Young people make up over 70% of South Sudan's population, and many young people feel disengaged without productive means to support their livelihoods, families and communities which results to their involvement in conflict and other negative actions. Ensuring that young people learn the *actual* skills needed for their communities and country is vital to ensure their active productive engagement. TVET/VT and skills development, in turn, has the potential to not only educate and train youth and others in relevant labour market responsive skills, but also help keep them engaged and economically productive to improve livelihoods for themselves, their families and their communities.

This study provides a comprehensive labour market assessment and review at the national level and detailed analysis in Juba and Lainya in former Central Equatoria; Bor, Fangak, Pibor, Duk and Twic East in former Jonglei; Twic and Kuajok in former Warrap; and Wau in former Western Bahr El-Ghazal. The study lays out key labour market and TVET/VT and skills development assessment findings and recommendations in how to align South Sudan's provision of TVET to labour market demands and needs.

South Sudan cannot risk having a lost generation, and ensuring that the sector is labour market responsive not only supports national economic development in a streamlined and responsive manner, but also the livelihoods of young people.



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## Acknowledgements

This study is the result of a collaborative effort made by the Ministry of Labour, Public Service and Human Resource Development (MoLPShRD) of South Sudan with support of UNESCO and the EMPOWER project funded by the European Union, which was conducted by Forcier. The MoLPShRD was the lead government ministry involved with support from the National Bureau of Statistics. Special thanks to John Chol Daau, Ben Waigo and Samuel Imma from MoLPShRD for their contributions. Appreciation is also given to Hai Tiet, Bharati Pokharel and Saluwen Yoasa Wurbe Sanya from UNESCO and EMPOWER partners (NRC, ACROSS, BBC Media Action, FCA, Nile Hope and VOSDO) including Craig Dean for their input and cooperation in producing this study. The study acknowledges the research team involved in the data collection and drafting of the document including John Honohan, Sara Kaserer, Rinchin Gaekwad, Fouad Pervez, Sneha Thayil and Kur Peter Garang of Forcier. The study would like to thank economist Anushka Chawla, labour market specialist Leslie Mhara and Jonathan Forney, Samuel Ha and Zakia Nouri from Forcier's Global Technical Team for providing their expert opinions and review of this study.

Appreciation is also extended to the TVET working group and TVET/VT centres and local authorities for their cooperation as well as all participants for their time and opinions including those shared during focus group discussions and key informant interviews.

Acknowledgements are also extended to Sardar Umar Alam under UNESCO's Office in Juba, South Sudan for his guidance and H  l  ne Guiol, Borhene Chakroun and Enrique Pinilla Martin at UNESCO Headquarters for their valuable feedback and support.

This study was completed as part of the EMPOWER project supported by the EU and the Capacity for Education Development (CapED) - Technical and Vocational Education and Training (TVET) programme in South Sudan, which is kindly supported by the Governments of Finland, Norway and Sweden along with Dubai Cares.

This publication was produced by UNESCO and the EMPOWER project with the financial support of the European Union. Its contents are the sole responsibility of UNESCO and the EMPOWER partners and do not necessarily reflect the views of the European Union, Finland, Norway, Sweden and Dubai Cares.

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## Abbreviations

CDS	Consumer Demand Survey
COMESA	Common Market for Eastern and Southern Africa
CSOs	Civil Society Organisations
FAO	Food and Agriculture Organisation
FCA	Finn Church Aid
FGD	Focus Group Discussion
FY	Financial Year
GDP	Gross Domestic Product
HH	Household
ICT	Information and Communication Technologies
IDP	Internally Displaced Person
MOS	Market Opportunity Survey
MoLPSHRD	Ministry of Labour, Public Service and Human Resource Development
MoGEI	Ministry of General Education & Instruction
NBS	National Bureau of Statistics
NRC	Norwegian Refugee Council
PoC	Protection of Civilians sites
SSP	South Sudanese Pounds
TNA	Training Needs Assessment
TVET	Technical and Vocational Education and Training
UNESCO	United Nations Educational, Scientific and Cultural Organisation
USD	United States Dollar
VOSDO	Vocational Skills Development Organisation
VT	Vocational Training
VTC	Vocational Training Centre
WFP	World Food Programme
YSS	Youth Skills Survey

## Executive Summary

### INTRODUCTION

South Sudan is a country facing immense political and economic challenges that threaten its development as a peaceful, independent nation. Conflict is presently endemic in South Sudan, given the continuing clashes between various groups as well as frequent inter-community tensions. The country's economy is struggling, partly due to the ongoing conflict and a poor education system resulting in high poverty, food insecurity, unemployment, child labour and inflation – a circular poverty trap. Furthermore, over 70% of the population is made of young people (below age 29),<sup>1</sup> there is a great need to involve them as youth express disengagement and restlessness as concerns which contributes to the risk of them joining the conflict and negative actions. UNESCO, through the *Capacity Development for Education* programme, advocates the use of TVET including VT and skills development activities to help mitigate some of South Sudan's main challenges, support youth and aid the country's development, while EMPOWER, via the *Strengthening Civil Society and Enhancing Technical and Vocational Education and Training for Youth Employment in South Sudan* project, aims to empower local civil society organisations (CSOs) and to promote active citizenship through access to relevant TVET activities, income generating opportunities, and through a CSO Funding Mechanism for South Sudan. EMPOWER is funded by the European Union and implemented by NRC, ACROSS, BBC Media Action, FCA, Nile Hope and VOSDO.

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<sup>1</sup> United Nations, Department of Economic and Social Affairs. (2017). World Population Prospects: The 2017 Revision, custom data. Accessible via

### PURPOSE

In line with UNESCO and EMPOWER's goals, this study was undertaken to perform an analysis of South Sudan's current labour market conditions, with a deliberate focus on its linkages with TVET/VT/skills development programmes. The study offers insights into the challenges the country faces both on a macro level (through a desk review) and a micro level in select locations across South Sudan (through primary research). It touches on a number of marketplace dynamics such as national and fiscal policies, consumer and vendor experience, youth preferences, cultural attitudes and social norms surrounding TVET/VT/skills development programmes and employment and major challenges of doing business. Primary data was collected in Juba in former Central Equatoria, Bor, Fangak in former Jonglei, Twic in former Warrap, and Wau in former Western Bahr El-Ghazal. Locations assessed via available secondary data are Kwajok in the former state of Warrap, Pibor, Duk and Twic East in former Jonglei and Lainya in former Central Equatoria. The study ultimately presents a set of potential strategies which can be pursued to maximise the effectiveness of TVET/VT/skills development campaigns, fully tap into the potential of the youth and ultimately contribute to the improvement of the economic situation in South Sudan.

### METHODOLOGY

This study uses a mix of quantitative and qualitative methods to fulfil the purposes outlined in the previous section. A comprehensive study was conducted comprising of an extensive desk review, quantitative consumer demand survey with 180 consumers,

<https://www.un.org/development/desa/publications/world-population-prospects-the-2017-revision.html>

quantitative market opportunity survey with 180 vendors, a quantitative youth skills survey with 180 youth, quantitative TVET/VT/skills development capacity assessment survey at 13 TVET/VT/skills development centres, 20 focus group discussions (FGD) with youth and 31 key informant interviews with community leaders and influencers, agriculturists and government officials.

## LIMITATIONS

TVET/VT/skills development graduates who participated in the FGDs were selected on the basis of convenience (which was primarily a function of availability and being known by local leaders). In rural locations, none of the FGDs included a TVET/VT/skills development graduate as they were said to have moved to urban areas in search of employment opportunities.

The sample size, when disaggregated by location, is limited and is meant to provide a snapshot of the markets involved. Further large studies may be required to confirm the findings presented in this report. In order to address this limitation, the data was triangulated between multiple quantitative and qualitative tools as well as with secondary literature.

## KEY FINDINGS – MACRO-LEVEL

### South Sudan: Economic and Security Challenges

The South Sudanese economy has faced challenging trends on key indicators particularly national GDP, poverty rates, household consumption and exports. This is partly because of low production in agriculture and oil due to ongoing conflict. The country exports few products outside of oil. It has also had near-

hyperinflation, as its currency rapidly depreciated, greatly harming South Sudanese consumers and producers. The currency is volatile, creating even greater economic instability. Government spending has increased in this timeframe, but primarily for military, not for social welfare or industrial policy to help support those harmed by the economic downturn.

The continuing conflict contributes to the country's economic situation challenging both labourers and businesses, who are unable to perform their normal activities due to safety concerns. It also discourages foreign capital investment. Much of the conflict has occurred in agricultural regions of the nation straining South Sudan's key industry. The conflict has resulted in approximately 300,000 casualties and four (4) million displaced people (out of a population of 12 million), of which half are refugees and the other half are internally displaced persons (IDPs) within South Sudan.<sup>2</sup>

### South Sudan's Labour Market – Low Labour Supply and Demand, and High Costs

Productive labour markets have a few key characteristics: strong supply of skilled job seekers, high demand for those potential workers and efficiency in markets, which primarily is seen through low transaction and information costs. South Sudan faces challenges on all of these though there is also potential for improvement.

South Sudan has low human capital as the workforce is poorly skilled for most jobs beyond subsistence farming. This is a result of the education system, which faces serious challenges including poor facilities, poor sanitation, limited

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<sup>2</sup> OCHA. (2018). Humanitarian Needs Overview: South Sudan. Retrieved from

[https://reliefweb.int/sites/reliefweb.int/files/resources/South Sudan 2018 Humanitarian Needs Overview.pdf](https://reliefweb.int/sites/reliefweb.int/files/resources/South%20Sudan%202018%20Humanitarian%20Needs%20Overview.pdf)

resources, limited number of teachers, little oversight and major rural/urban and gender disparities. Most South Sudanese do not complete primary school. Some surveys suggest school is unaffordable for many.<sup>3</sup> The conflict exacerbates the education issue as schools have been shut down for safety concerns or have been damaged by fighting. Many families have fled their homes and displaced children are far less likely to be enrolled in school. Not surprisingly, the resulting workforce is largely illiterate, lacks basic training in math, science, computer science or business and is only able to do unskilled jobs. In addition, child labour is prevalent across the country, resulting in many children who lack the adequate education and skills to enhance their prospects in the labour market.

However, there are some potentially positive signs for the labour supply. As over 70% of the population are young people, this high number of young people could provide many years of productive labour, if they are properly trained. In addition, given the poor education system, there is a parallel education system that offers informal opportunities for South Sudanese to gain skills for the labour market. This includes vocational and technical schooling and training as well as accelerated primary school education. This system provides South Sudanese with avenues to obtain basic numeracy and literacy skills as well as specific skills for a variety of professions such as tailoring skills and computer literacy.

In addition to the lack of skilled labour, the limited demand for labour poses a major challenge for the South Sudanese economy. The country does not have a national economy – rather, the economy appears to be composed of

multiple small local markets that operate in isolation. The goods bought and sold in these markets suggest the type of goods in-demand in South Sudan, which, in turn, suggests the types of labour in-demand. An examination of the markets reveals that agriculture or household goods that require low-skilled labour are the main products sold. However, both inflation and the ongoing conflict have negatively impacted these markets resulting in many shrinking in size or crashing and decrease in household income and purchases.

Exports are another way to assess labour market demand – products exported in high numbers come from prominent industries that likely have greater demand for labour. For South Sudan, however, oil is the country's only major export. This implies that the primary demand of goods produced in South Sudan is the domestic market, and the domestic market can be seen in the local markets. Imports offer a different approach to labour market demand – goods imported in high numbers are potential areas for industrial policy that can result in jobs. For South Sudan, however, the main imports are products that the country already produces, vegetables and food items, again showing limited potential demand for labour outside of agriculture.

Finally, South Sudan has inefficient markets. It is expensive to transport and produce products in large quantities and keep markets local, which limits the national economy that could move surplus products beyond local markets. Costs are high for several reasons. First, transportation is expensive as South Sudan has the lowest road

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<sup>3</sup> Koepl, Dominik. (2017). Education Cluster Assessment: South Sudan. South Sudan Education Cluster. Retrieved from

[https://reliefweb.int/sites/reliefweb.int/files/resources/nati-on-wide\\_assessment\\_report\\_-\\_ssec\\_-\\_2017-11.pdf](https://reliefweb.int/sites/reliefweb.int/files/resources/nati-on-wide_assessment_report_-_ssec_-_2017-11.pdf)

density in all of Africa.<sup>4</sup> Very few roads are paved making it costly to transport goods beyond local locations. Second, there is extremely low access to electricity – South Sudan has the second lowest electricity power consumption in the world.<sup>5</sup> This limits industries that need electricity for production and also implies a poor or non-existent cold chain supply (which would depend on electricity), which is key for transporting perishable items like agricultural products beyond local markets. Third, South Sudan's heavy dependence on oil leads to its economy functioning inefficiently for several reasons: oil reliance negatively impacts the exchange rate and diverts a substantial amount of resources from non-oil industries that could employ far more people. This results in the economy being extremely reliant on, and vulnerable to, the very volatile petroleum market, which can have rapid price changes. Indeed, a drop in oil prices played an important role in South Sudan's recent economic downturn.

### Specific Sectors for Growth – Agriculture and Livestock

The largest sector in the labour market in South Sudan is agriculture as almost all South Sudanese depend on farming, fishing or herding for food. Most livelihoods are in unpaid agriculture and pastoralist work. A multitude of food and cash crops are produced in South Sudan including sorghum, maize, pigeon peas and coffee. In addition, areas of the country have untapped potential for further crop production.

The agricultural sector faces productivity challenges. Key amongst them are that much of the country's fertile land is not being used,

farmers rely on poor techniques and methods, farmers have limited access to quality seeds and planting materials, and they have lean profit margins given high taxes and high costs of transportation.

The livestock subsector of agriculture is also critical to the country's labour market and worth discussing separately. Most South Sudanese own at least one animal – animals outnumber people in South Sudan. Livestock is a substantially large industry, employing almost one million farmers and contributing over three billion USD to the economy giving South Sudan the highest livestock per capita rate in all of Africa.

Despite its size, the income generated by the livestock subsector only meets approximately 20% of its potential. The conflict is a major reason as it has resulted in a large decline in herd sizes. There has also been a rise in disease outbreak as a result of livestock being moved for safety reasons. South Sudan has poor animal health services and poor husbandry practices, which also contribute to heightened diseases among livestock. Animal feeds are inadequate, which results from poor grazing practices, poor pasture and water management and limited supplements in animal diets. There is also a major cultural challenge – cattle are primarily used for symbolic purposes not for business. In addition, there is not a strong business orientation of the livestock subsector; only a small fraction of the commercial value of livestock is being realised.

### The Need for an Area-Based Approach

While there are national strategies that must be employed to help improve South Sudan's labour

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<sup>4</sup> CARE International, PAH and Nile Hope. (2017). Multi-Sector Rapid Needs Assessment: Northern Liech State Report: Greater Koch Region (Liech and Gany Counties), South Sudan, 6-10 April 2017.

<sup>5</sup> World Bank World Development Indicators. Accessible via <https://data.worldbank.org/indicator/>

market, the lack of any real national market makes it vital to adopt an area-based approach to adequately assess the labour market – or more accurately, the different labour markets – in South Sudan. Each locality has different challenges and opportunities. More importantly, as of now, there is no clear link between these different localities. Although the country overall needs to improve access to education, improve fiscal policy and reform the agriculture industry, these strategies will not necessarily improve the local labour markets. For instance, in some regions, the construction industry shows more promise than agriculture, while in others, fisheries may offer the most potential. For this reason, it is crucial to analyse and understand individually the landscape of markets in each region of the country.

## KEY FINDINGS – MICRO-LEVEL

### Markets can Thrive but Financial Barriers are Significant

On a more localised level, the study has revealed that there is immense scope for several trades to expand in all the markets surveyed. However, fundamental challenges which require immediate attention exist across all markets. Across all locations, businesses want to expand, consumers are in need of more and better quality products and services and youth are keen to work and set up businesses. However, the absence of a well-functioning formal financial system creates a common barrier for all these potential growth areas. This barrier is visible in the form of high prices for consumers and lack of capital and easy access to financial institutions for other market actors. This influences the ability of small traders

to expand businesses despite positive intentions and to employ youth despite the availability of skills in the labour market, which ultimately influences their ability to satisfy the demand deficit for several products and services. In order to avoid this poverty trap, the financial barriers need to be taken into account both for future TVET/VT/skills development programming and also to contextualize the other conclusive trends the study revealed, which are summarised below.

While small differences exist between the locations, broad trends can be distinguished through the aggregate data. Based on the level of demand for products/services on the consumer side and their reason for dissatisfaction and availability of jobs in the market, the following trades can be considered to be in high demand<sup>6</sup> of labour across all locations: beautician, leather work, livestock management (herding and selling), mobile charging services, tailoring and fashion design, welding and metal works, soap and beauty item fabrication and books/stationary fabrication. Based on the same factors, trades observed to be in medium demand<sup>7</sup> of labour include mechanised agriculture, subsistence agriculture, arts and crafts, hairdressing, catering, computers/ICT, construction, dairy farming, dry cleaning, systems installation, appliance repair, fish farming, food processing, generator repair, healthcare, hospitality service, honey production, masonry, bicycle and boda mechanics, poultry farming, plumbing, shoe repair, driving, photography, printing, auto spare parts supply/reselling, wood works, medicine production and consumer goods (e.g., sports equipment or mobile phone accessories). A detailed analysis is provided in Annex 12.

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<sup>66</sup> Based on 50% or more consumers mentioning that they are dissatisfied with the concerned product or service due to high prices, availability, poor customer service or poor product quality.

<sup>7</sup> Based on 25 to 50% or more consumers mentioning that they are dissatisfied with the concerned product or service due to high prices, availability, poor customer service or poor product quality.



From the above list, in Juba and Wau, consumers primarily struggle with poor quality, while in Fangak, Twic, and Wau, lack of availability is a consistent issue. In Kwajok the most unmet demand is for poultry, fish and mobile phone repair. In Lainnya, demand is highest for oil, flour, and goat meat. Duk and Pibor experience demand for agricultural products and infrastructure repair.

### Businesses are Keen to Expand, but Require Support

Willingness to expand business was observed to be very high across all locations. Driving was seen to be among the top sectors. Additionally, there were a few other businesses which plan to hire several (more than eight) employees per business in the near future. In Juba, these included driving, printing, and boda mechanic services; in Twic, driving, hairdressing, and boda mechanic businesses; in Wau, driving, hospitality, and appliance repair/spare parts businesses; in Bor, hospitality businesses in Fangak, general trader or retailer businesses; and in Kwajok, hospitality businesses and agricultural products. All secondary locations<sup>8</sup> expressed interest in microfinance and other forms of support such as start-up capital or loans.

### TVET/VT/Skills Development Perceived Very Positively, Yet Post-Training Employment Rates are Low

The general VT experience indicates mixed success. The positive side is that youth perceive VTs to add a lot of value to the profile of a job aspirant and believe that it can help them obtain a better salary. On the other side, the data suggests that not many people are able to gain

employment immediately after their VT graduation. The prevalence of career counselling is also very low leaving graduates with no real opportunities to learn about career planning and improving job preparedness.

Regardless of their VT status, youth face numerous other obstacles when seeking employment, which also impacts overall employment rates. There is a sense of despair amongst young people that job searches have extremely low success rates due to high competition and prevalence of employment based on connections. This may, in part, explain the generally high proportion of youth willing to start businesses. However, the fact that they tend to choose access to capital and start-up grants over skills and knowledge conveys their attitudes and potential motivations to undertake business skills training. In other words, they may be more motivated to start their own business if equipped with the start-up capital and/or tools in addition to skills and knowledge.

### Youth Seek Good Salaries, Low Entry Requirements and Enjoyable Work

Youth clearly rate their ability to “enjoy” their chosen domain as one of the few important factors that matter when choosing their trade, after a good salary and low entry requirements. This could be one of the reasons for the observed gap between trades perceived by the community as providing an income versus trades perceived by youth as providing them with good employment opportunities. In part, this gap may be the result of the connotations of respect, ease of entering the domain and potential for growth, which respond better to youth aspirations. This might also explain why half of the youth surveyed

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<sup>8</sup> Secondary locations for this study are Kwajok, Pibor, Duk, Twic East and Lainnya

were actively looking for a change of job despite being employed as they seek jobs which provide more respect and room for growth. Charcoal-selling is one such controversial trade as it is among the most frequently purchased products in all locations sold by youth in Wau and Bor, yet considered least profitable and carrying connotations of 'dirtiness' that render the trade socially undesirable.

Professionalised courses such as computer/ICT, healthcare, finance, hairdressing, appliance repair work, tailoring and mobile charging/repair businesses appear to provide more sustained amount of work in a week, which indicates a need for better market penetration in these domains. Mobile phone repair demand is particularly noticeable in Kwajok, which is undergoing a mobile phone boom at present. Further differences between domains by location are not apparent.

#### Usefulness of VTs Undermined by Lack of Post Training Support

VTs were perceived to be useful by most recipients in all locations except Wau, where fewer VT graduates found VTs to be useful. Across locations, those who do not find trainings useful typically cite the lack of capital or tools to put trainings into action after the end of the course as the reason. The number of youth who have received VTs is also low and was observed to be tied to low awareness about VT opportunities and the perception that there were not many VTs available. Awareness about where to seek training opportunities was significantly lower in Wau than other locations. Rates of employment post-VT were observed to be quite low too, which attributed mainly to the lack of job availability. This points towards the lack of support from vocational training providers for transition of graduates from VT-graduation to the

job market. This is compounded by the general lack of tracking and tracing of ongoing skill deficit in the local market to inform the selection of VT courses being offered by VT providers. The VT providers in Juba are the strongest example of providers making these links, which are observed less in the other locations.

#### Course Offerings Driven by Supply and Available Funding

On the VT providers' front, course offerings are largely supply-driven due to the widespread notion that any and all types of trainings are desirable where provision is so limited. The next most common methods for determining course offerings depend on funding, while a few also look at the skills in demand in the labour market. Trainings offered in the secondary locations in the past have entirely focused on agricultural improvements. A lack of common standards and a formal certification system, extremely low literacy rates among participants, language barriers and a general failure to systematically determine local demand for skills have all impacted the quality of training. Language trainings especially must not be overlooked as an avenue for intervention, as it acts as a catalyst, and compounds the effects of other trainings or existing skills of participants. The absence of a coordination platform where VTCs, implementers, ministerial bodies and donors can interact is a limiting factor to implementing a coordinated effort to build youth capacities. On the positive front, policies regarding gender inclusion, teacher salaries and teacher code of conduct do exist in many VTCs.

#### Linkages with Private Sector are Non-existent

Currently, the engagement of VTCs with employers is also very low. The engagement is mainly indirect, through provision of job

references, dispersion of information on job vacancies and some limited career counselling. Most VTCs do not actually engage with employers or have any tie-ups which could provide on-the-job training, priority recruitment or any other type of exclusive value-added opportunities to VT graduates.

## RECOMMENDATIONS

South Sudan has both short- and long-term strategies it can pursue to improve its labour market. However, it is important to understand the limitations of policies and programmes. The continuing conflict in South Sudan will likely play a major role in its economy as it impacts every aspect of labour markets. That being said, in the short-term, to improve the labour market, South Sudan **should make strong efforts to strengthen its most dominant sector, agriculture (and its subsector, livestock)**. Given the high number of South Sudanese who are tied to agriculture (and livestock), **improving the productivity and lessening the inefficiencies present in both** should help improve job prospects and financial rewards for a good number of people in-country. This includes **offering incentives to farm unused fertile lands, avoiding high taxes on farmers, commercializing non-cattle small livestock, subsidising animal nutrition supplements and providing better animal health services**. Most relevant, **better training through technical and vocational programmes** could make a major impact on improving farming and livestock efficiency and financial gains, both of which would positively impact the labour market.

As far as broader goals to help the labour market, South Sudan would be well-served to **encourage large foreign investment** to help **build its construction industry and improve its infrastructure** in addition to needed government investment in this area. There is a great need for

better roads and infrastructure and the possibility of creating a vibrant industry to handle it. It can utilise TVET/VT/skills development programmes to help train workers for these jobs. From a jobs standpoint, this would clearly help the labour market, but it would also help lower market inefficiencies from high costs of business. In addition, the government can help support non-oil industries (like construction, agriculture, and light manufacturing) to help shift the country away from its high dependence on oil. Various government departments could collaborate more closely with TVET/VT/skills development centres to give preference to vocationally trained youth in government-led tenders, thereby providing jobs at scale.

From the labour supply perspective, South Sudan could improve the quantity of skilled labour by **improving their education system** as well as **improving technical and vocational training programmes**. Most people in South Sudan lack technical or vocational training and most did not even finish primary school. As a result, these programmes are often the only way for them to gain relevant skills. However, it is important to ensure these programmes are in line with the labour market itself. This is the area with TVET/VT/skills development programmes can offer the most assistance – many South Sudanese lack marketable skills and have few ways to obtain them. With strong investments from the government, the private sector and foreign donors and investors, TVET/VT/skills development programmes could rapidly improve the supply of skilled labour in South Sudan.

From the labour demand perspective, it is critical that the private sector is strengthened through **supporting new businesses, strengthening existing ones and encouraging their linkages with TVET/VT/skills development centres**. This can be done through training programmes, incentives

for entrepreneurship or business investments, and overall industrial policy. The only way labour demand can improve and break the poverty trap is if the economy itself is doing well and that comes about with a stronger private sector. Here, TVET/VT/skills development programmes can help by training people in good business practices and a variety of trades with a confirmed demand.

In general, while there are a few overarching trends and findings observed, the economic situation differs from one region to the other. Thus, the key actors leading policy making and

implementing initiatives will find it useful to adopt an **area-based approach** to develop a mix of appropriate macro and micro level solutions to the various issues plaguing the South Sudanese economy. This is evidenced through the variations in the results of the TVET/VT/skills development and market study conducted in five different locations in the country.

A full range of more localised recommendations can be found in the study.

## Background

South Sudan is a country facing immense political and economic challenges that threaten its development as a peaceful, independent nation. Conflict is presently endemic in South Sudan given the continuing clashes between government and opposition forces as well as frequent inter-community conflicts. The country's economy is struggling partly due to the ongoing conflict and a poor education system resulting in high poverty, food insecurity, unemployment, child labour and inflation. To address the current conflict and socio-economic situation in the context of fragile states and support Sustainable Development Goals 4 and 8, the United Nations Educational, Scientific, and Cultural Organisation (UNESCO) and EMPOWER project funded by the European Union (EU) have jointly focused on Technical and Vocational Education and Training (TVET), vocational training (VT) and skills development as a peacebuilding intervention to engage youth and other populations to deter their involvement in conflict and unite communities towards a shared and common economic/livelihood goal.

UNESCO, through the Capacity Development for Education programme, advocates the use TVET/VT/skills development programmes to help mitigate some of South Sudan's main issues to help with its development, while EMPOWER, via the Strengthening Civil Society and Enhancing Technical and Vocational Education and Training for Youth Employment in South Sudan project, aims to empower local CSOs and to promote active citizenship through access to relevant TVET/VT/skills development activities, income generating opportunities and through a CSO Funding Mechanism for South Sudan.

Understanding the labour market is vital for TVET activities and therefore for both UNESCO and EMPOWER. NRC, on behalf of the EMPOWER project, has commissioned a labour market study that will provide locally relevant information regarding labour skills, employment opportunities and TVET/VT/skills development providers' capacity and relevance to the labour market. UNESCO has commissioned a desk review, presenting an analysis of the South Sudan's current economic situation, offering insights into the challenges the country faces with its labour market and making recommendations as to how UNESCO and other stakeholders can best design and use TVET/VT/skills development programmes to help improve South Sudan's labour market and spur economic development. Both EMPOWER and UNESCO outputs have been combined to form this report.

This report begins with the desk review, commissioned by UNESCO, which creates a national picture by drawing together a wide range of publicly available sources many of which focus on specific counties and payams within South Sudan. The desk review begins with a brief description of issues South Sudan faces, particularly economic and security concerns. It then focuses on the key components of labour markets and analyses how South Sudan fares on all these counts. It also examines specific critical sectors in the South Sudanese labour market. It finally offers suggestions for improving the labour market based on an analysis of the information it covers.

The report then delves into the findings from the primary data collection based on a survey of vendors, consumers, youth and TVET/VT/skills development centres in select locations across South Sudan. The

study objectives were to establish a snapshot of the markets surveyed, map cultural attitudes and social norms towards TVET/VT/skills development and employment, and assess TVET/VT/skills development services, apprenticeships and income generating opportunities. Locations studied with primary data collection were Juba in the former state of Central Equatoria, Bor and Fangak in former Jonglei, Twic in former Warrap, and Wau in former Western Bahr El-Ghazal. Locations assessed via available secondary data were Kwajok in former Warrap, Pibor, Duk and Twic East in former Jonglei and Lainya in former Central Equatoria. The study concludes with the overall conclusion and a selection of targeted recommendations which could serve as a starting point for future initiatives.

## Study Purpose

This study presents an analysis of the South Sudan’s current labour market offering insights into the challenges the country faces both on a macro level and on a micro level in select locations across South Sudan. It also offers a set of potential strategies which can be pursued to maximise the effectiveness of TVET/VT/skills development campaigns, fully tap into the potential of the youth and ultimately positively contribute to the uplifting of the economic situation in South Sudan.

The study is expected to serve as a basis for the development of the relevant provision of market-demanded skills training. The study objectives are summarised below:

Table 1: Labour Market & TVET/VT/Skills Development Study Objectives

Study Objectives	
<b>Market and Labour assessment</b>	Identify gaps and requirements of skills, products, services and support to meet identified needs through TVET/VT/skills development activities
	Identify available skills gained through TVET/VT/skills development, schools, tertiary/formal institutions
	Identify available jobs in the market which can be filled by TVET/VT/skills development graduates focusing on highly demanded skills
	Identify opportunities and requirements for agricultural business, youth businesses, income generating activities and formal employment
	Identify sectors available in local markets that can be expanded
	Analyse government policies that promote or hinder youth TVET/VT/skills development training, apprenticeships, youth skill development, etc.
<b>Cultural attitudes and social norms</b>	Map cultural attitudes of youth, community members, local leaders, influencers, with regards to TVET/VT/skills development, youth employment and entrepreneurship
	Identify social norms and barriers with regards to access to TVET/VT/skills development, employment opportunities and youth entrepreneurship across the project locations

<b>TVET/VT/skills development services</b>	Identify how and where can South Sudanese youth access career guidance, job opportunities and business start-up capital as well as identify means of improvement
	Map governance structures, existing capacity, staff qualifications, needs and services provided by local TVET/VT/skills development institutions, resources and courses availability/duration and identify means of encouraging young mothers to utilise TVET/VT/skills development services
	Determine the relevance of skills training courses offered in the existing centres, against skills demand in the surrounding areas
	Assess the immediate priority skills needs, with attention to supporting women and environmental sustainability
	Identify other economically significant sectors and demanded products where skills deficient/lack of resources might constrain future employment and local economic growth
<b>Apprenticeships and income generating opportunities</b>	Provide an overview of labour market trends and needs
	Identify how youth find jobs or training opportunities and classify how businesses access financial capital
	Assess the success of previous TVET/VT/skills development /income generating projects implemented in the areas and identify recommendations from previous graduates
	Identify businesses that have the capacity and willingness to take on TVET/VT/skills development placements and provide employment
	Identify mutually beneficial arrangements to provide youth attending TVET/VT/skills development courses with on the job learning and employment opportunities

## Methodology

To best address the above objectives, this study uses a mix of quantitative and qualitative methods to collect relevant data. The study comprises of an extensive desk review, quantitative consumer demand survey, quantitative market opportunity survey, quantitative youth skills survey, quantitative TVET/VT/skills development capacity assessment survey and qualitative interviews with selected key informants. A detailed approach to sampling and respondent recruitment is presented below.

### Desk Review

This study conducted a comprehensive review of all existing documents, including proposals, relevant literature and other project documents, for both the primary and secondary locations. For this report, primary locations are where data was collected for this particular assessment: Juba, Bor, Fangak, Twic, and Wau. Secondary locations are those where data was collected through other studies: Kwajok, Pibor, Duk, Twic East and Lainya.

The desk review collected reports and research papers related to all aspects of South Sudan's labour market. This included analysing public datasets from the World Bank and reading and analysing any reports regarding the South Sudanese economy. Specific reports and papers on particular sectors in South Sudan, especially agriculture, as well as reports or papers on infrastructure in South Sudan were also examined in addition to reports and papers discussing the current conflict in the country. The most common sources were the World Bank and the African Development Bank. Key findings on the macro-level economic situation along with any relevant national policy analysis are presented separately, ahead of the localised findings, in this study.

Additionally, the findings from these secondary sources were used to triangulate, supplement or complement primary data findings and to collate existing literature available on the secondary locations of Kwajok, Pibor, Duk, Twic East and Lainya. Notable sources include: 1) BBC Media Access's 2018 formative research on knowledge, attitudes and practice towards TVET/VT/skills development as part of the EMPOWER project, 2) the Vocational Training Centre Assessment carried out by the Skills for Jobs funded by the European Union and implemented by Dorcas International, Edukans and Light of the World and 3) CARE International's data from market assessments in Twic East, Duk and Pibor. However, it is important to note that not every secondary location is represented in each section of this report due to the dearth of comparable and relevant information.

### Quantitative Research

A quantitative consumer demand survey and a market opportunity assessment were conducted among a random sub-selection of consumers and vendors at sample locations. Both surveys were designed to provide in-depth information on the study objectives outlined in Table 1 with particular focus placed on consumer demands/unsatisfied needs, price points, producer supply chains and expandability of businesses. A youth skills survey assessed the current level of skills in the local population as well as the interest and desire among young men and women for training and support. The TVET/VT/skills development capacity assessment survey captured data on the institutional setup, organizational capacity, quality and relevance of key TVET/VT/skills development functions, teaching and learning methods and standards, courses taught and infrastructural needs.



**Consumer Demand Survey (CDS)**

The Consumer Demand Survey (CDS) focused on unsatisfied needs of market consumers and addresses consumption patterns, exposure to emergency services in the past and demographics.

**Market Opportunity Survey (MOS)**

The MOS included a close examination of the supply chain of local markets and targets vendors, local producers and intermediaries. In addition to demographic questions, the MOS included questions about ease of doing business, expansion plans, support required, recruitment challenges, skills in demand as well as supply chain-related indicators.

**Youth Skills Survey (YSS)**

The YSS was used to assess the current level of skills in the local youth population, youth attitudes towards employment and trainings, recruitment challenges they face as well as their interest and desire to undertake trainings.

**TVET/VT/Skills Development Capacity Assessment**

The TVET/VT/skills development capacity assessment survey was designed to capture data on the institutional setup, organizational capacity, quality and relevance of key TVET/VT/skills development functions, teaching and learning methods and standards, courses taught and infrastructural needs.

The table presented below provides an outline of the research methods employed and corresponding allocations of interviews:

Table 2: Overview of sample

Methods		Former Central Equatoria			Former Jonglei			Former Warrap		Former Western Bahr El-Ghazal		
		Juba (urban)	Juba (rural)	Juba PoC	Bor (urban)	Bor (rural)	Fangak	Twic (urban)	Twic (rural)	Wau PoC	Wau (urban)	Wau (rural)
Quant methods	Market Opportunity Surveys	36 surveys	N/A	N/A	36 surveys	N/A	36 surveys	36 surveys	N/A	N/A	36 surveys	N/A
		<b>180 Surveys Total</b>										
	Youth Skills survey	36 surveys	N/A	N/A	36 surveys	N/A	36 surveys	36 surveys	N/A	36 surveys	N/A	N/A
		<b>180 Surveys Total</b>										
	Consumer Demand Surveys	36 surveys	N/A	N/A	36 surveys	N/A	36 surveys	36 surveys	N/A	N/A	36 surveys	N/A
<b>180 Surveys Total</b>												
Qual methods	Key Informant Interviews <sup>9</sup>	3 KIIs	4 KIIs	3 KIIs	3 KIIs	3 KIIs	3 KIIs	3 KIIs	3 KIIs	2 KIIs	2 KIIs	2 KIIs
		<b>31 KIIs</b>										
	Focus Group Discussions <sup>10</sup>	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	N/A	2 FGDs
<b>20 FGDs</b>												

<sup>9</sup> With TVET providers, business owners/influencers and community leaders

<sup>10</sup> With skilled and unskilled labourers including displaced community members

## Sampling Strategy

### CDS – Respondent Selection

A boma-level random sample draw was conducted for each location with probability proportionate to the size of the boma using the 2008 census data. Each location was allocated six clusters of six to make it 36 interviews per location. Within the selected clusters, the enumerator would identify the centre of the boma. From the centre of the boma, the enumerator would spin a bottle to randomly select a direction. The enumerator would then proceed in the randomly selected direction, interviewing every third household on the enumerator's right. At junctions, the enumerator made right turns, but they did not turn onto a road that they have already travelled (i.e., going in a full circle). In the event that the enumerator reached a dead-end, they would proceed back along the road or path that they have already travelled (not interviewing households that were previously on their left) until they reach a new road, where they resumed interviewing. Respondents were knowledgeable adults aged 15 and above. For the CDS, 36 interviews were conducted in each location.

### MOS – Respondent Selection

MOS respondents were equally divided between market traders/producers/retailers/shop owners in all the locations. Within the market, researchers randomly selected MOS respondents using a skip pattern while following a predetermined route through the market for a total of 18 interviews. Outside the market, researchers randomly selected MOS respondents from business owners and traders for a total of 18 interviews. Eligible respondents were above the age of 15 and were either selling goods at the market, producers and/or traders.

### YSS – Respondent Selection

A boma-level random sample draw was conducted for each location with probability proportionate to the size of the boma using the 2008 census data. Each location was allocated six clusters of six to make it 36 interviews per location. Within the selected clusters, the enumerator would identify the centre of the boma. From the centre of the boma, the enumerator would spin a bottle to randomly select a direction. The enumerator would then proceed in the randomly selected direction, interviewing every third household on the enumerator's right. At junctions, the enumerator made right turns, but they did not turn onto a road that they have already travelled (i.e., going in a full circle). In the event that the enumerator reached a dead-end, they would proceed back along the road or path that they have already travelled (not interviewing households that were previously on their left) until they reach a new road, where they resumed interviewing. Respondents were aged between 15 and 35.

### TVET/VT/Skills Development Capacity Assessment – Institution Selection

Institutions to be assessed were selected and interviewed by the EMPOWER partners<sup>11</sup>. The respondents were principals (or their deputies) or a senior trainer or someone with equivalent knowledge and authority in the TVET/VT/skills development centre.

## Qualitative Research

### Focus Group Discussions (FGDs)

Two focus group discussions - one with young men and one with young women - aged 18-35 years were organised in each location providing a total of 20 FGDs to help triangulate and complement quantitative

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<sup>11</sup> EMPOWER partners are NRC, ACROSS, BBC Media Action, FCA, Nile Hope and VOSDO

results. Efforts were made to have at least three TVET/VT/skills development graduates in each focus group, who were requested to remain for 10-15 more minutes after the discussion to speak about their TVET/VT/skills development experience.

Through the FGDs, the trained facilitators sought to obtain views from young people on the general labour market trends in each location, barriers to employment specifically for women and vulnerable persons, attitudes towards youth entrepreneurship and access to training/ TVET/VT/skills development. Questions were formulated in a simple and focused manner to keep the discussion on point.

FGD respondents were selected from the list of respondents that participated in the youth skills survey and to some extent, through convenience sampling of some youth who are also TVET/VT/skills development graduates.

#### Key Informant Interviews (KIIs)

A total of 31 KIIs were conducted to capture information for the study on a community or regional level. KII inputs helped provide context and triangulate the trends emerging from the quantitative data.

The line of enquiry was appreciative in nature and revolved around the informant's knowledge of the goods, services and skills in demand/supply, recruitment processes, recruitment experience of women and vulnerable persons, attitudes of businesses towards apprenticeships and mentoring, prevalent perception about TVET/VT/skills development and attitudes towards youth entrepreneurship. KIIs with ministry representatives sought to understand the government's labour market projections, needs and current and potential engagement with TVET/VT/skills development centres.

KIIs were conducted principally with key informants possessing the following profiles:

- *Business Influencers:* Preferably someone with established links with the local businesses such as a wholesale trader and in the location at least three years.
- *Government/Ministry Official:* A ministry official who is in charge of employment, labour market, TVET/VT/skills development development and/or youth affairs on a national or regional level.
- *Community Leader:* Someone who can speak authoritatively about the broader labour market such as a Boma chief, NGO staff member or teacher or similar capacity.
- *Farmers:* Preferably experienced farmers who could answer questions about the agricultural value chain and challenges faced in their domain.

KII respondent selection was done on the basis of snowball sampling, meaning respondents provided references for other suggested respondents as well as references from NRC and its partner organisations.

## Limitations and Challenges

There were a few limitations and challenges to this study. The main limitation in all the locations during fieldwork was identifying TVET/VT/skills development graduates to participate in the FGDs. Most graduates tend to move from one location to another in search of employment and their contact information were not readily available at the TVET/VT/skills development centres. In urban locations, researchers had to rely on community leaders to identify TVET/VT/skills development graduates.

Therefore, TVET/VT/skills development graduates who participated in the FGDs were selected on the basis of convenience (which was primarily a function of availability and being known by local leaders). In rural locations, none of the FGDs had a TVET/VT/skills development graduate as they were said to have moved to urban areas in search of employment opportunities.

The sample size, when disaggregated by location, is limited and meant to provide a snapshot of the markets involved. Further large studies may be required to confirm the findings presented in this report. In order to address this limitation, the data was triangulated between multiple quantitative and qualitative tools as well as with secondary literature.

The secondary data findings for Kwajok and Lainnya are primarily from a GIZ study and IOM report both from 2013. As marketplaces are dynamic, this should be taken into account when interpreting the findings.

## Considerations for Readers

This report is structured in a way to first showcase the macro level findings followed by localised findings. Within the location specific findings, the perspectives of the consumer are first presented followed by those of the vendors and then of youth. This is followed by the findings from the mapping of vocational training centres conducted by EMPOWER partners.

Each section is further divided into themes. Within each theme, findings for each location are presented separately when they are different from the findings within other locations and presented in a combined manner when similar trends have been observed across locations.

Indicators with a small number of response options are presented through bar graphs, while indicators with several more options are presented through colour coded descriptive frequency tables with the intensity of colour reflecting the frequency of responses chosen. In some cases, columns in frequency tables might not add up to 100% if the question response was multiple choice in nature.

The current domain of work of youth respondents has been recoded as per the reference list of 47 skilled trades guiding this study, compiled and agreed upon by Forcier and EMPOWER partners. Therefore, unskilled domains reported by respondents have been combined into one category.

Due to the high number of locations being analysed simultaneously, the charts do not show data labels by default but can be viewed by hovering on the relevant bar. This was done to improve readability of charts.

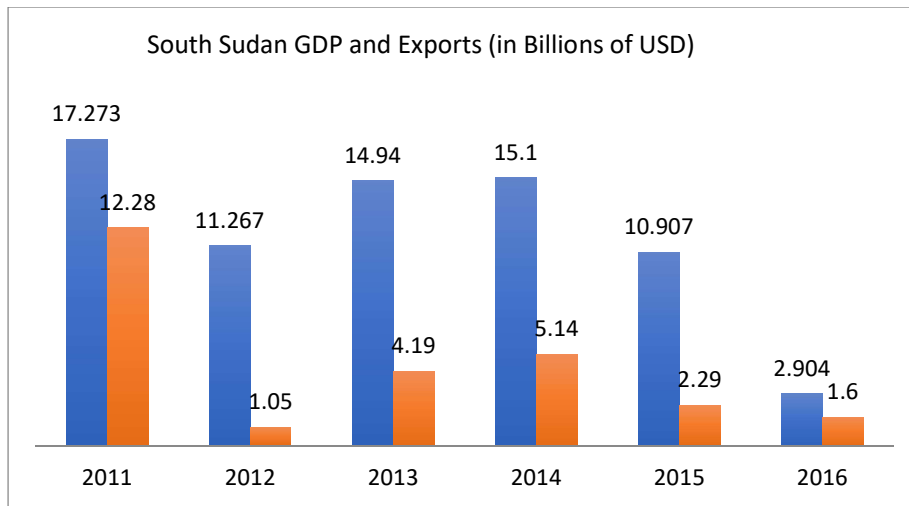
# 1. Key Macro-Level Findings

## 1.1. South Sudan: Economic and Security Challenges

The South Sudanese GDP has consistently been declining – it contracted an estimated eleven percent in financial year (FY) 2017 alone.<sup>12</sup> This is largely due to poor agricultural production and disruptions in oil production both of which were important causes and effects of cyclical conflict.<sup>13</sup> In addition to the decrease in GDP, exports, which were already very minimal (outside of oil), declined, as did household consumption.

Inflation also rose substantially as the currency rapidly depreciated. Following the government’s move to a floating exchange rate in 2015, the South Sudanese Pound (SSP) went from 18.5 per dollar in December 2015 to 172 per dollar in August 2017 in the parallel market. Instability has played a role in its depreciation.<sup>14</sup> On the official market, one dollar currently exchanges for 145 SSPs.<sup>15</sup> This depreciation made the SSP worth substantially less in foreign exchange leading to loss of value when exchanging currency and resulting in the rise in prices of foreign products for people or companies in South Sudan who buy and sell in SSP. The volatility in the value of the currency has also been a source of instability as the value of the SSP fluctuates rapidly.

Figure 1 : South Sudan GDP and Exports



Source: World Bank World Development Indicators Data.

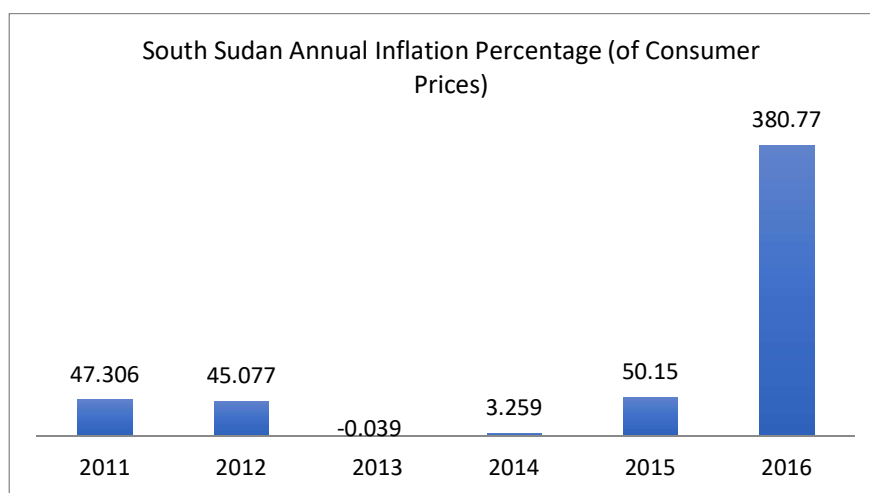
<sup>12</sup> World Bank. (2017). South Sudan Economic Update: Taming the Tides of High Inflation. Retrieved from <http://documents.worldbank.org/curated/en/806291508505062484/pdf/120563-WP-SSEUUpdatefinal-PUBLIC.pdf>. Readers should note that, like many developing countries, South Sudan has fewer resources and institutions to collect consistent and reliable data in comparison to developed countries. This explains why there is much less data available for South Sudan for several economic and political measures.

<sup>13</sup> *Ibid.*

<sup>14</sup> World Bank. (2017). South Sudan Economic Update: Taming the Tides of High Inflation. Retrieved from <http://documents.worldbank.org/curated/en/806291508505062484/pdf/120563-WP-SSEUUpdatefinal-PUBLIC.pdf>

<sup>15</sup> Data from South Sudan Central Bank. Accessible via <https://bankofsouthsudan.org>.

Figure 2: South Sudan Annual Inflation Percentage



Source: World Bank World Development Indicators Data.

South Sudan's annual inflation was just below the hyperinflation standard in 2016.<sup>16</sup> Currency devaluation is highly problematic given the country's reliance on foreign goods due to its limited domestic production base. Although government spending has increased over the past few years, increases in spending have focused primarily on the military, not on social welfare, excluding the average South Sudanese citizen from economically benefiting from the increased spending. The increased spending, coupled with lower government revenues from lower oil production and prices has resulted in rising deficits. The government has monetised this debt through the central bank, which has played a major role in rising inflation.<sup>17</sup>

One of the main reasons South Sudan's economy is faltering is the high degree of conflict in-country. This insecurity complicates all aspects of economic development discouraging foreign capital investment and creating challenges for labourers and businesses who are unable to perform their usual activities because of safety concerns. The current insecurity follows a violent history which involved two long civil wars as a secessionist region that was then a part of Sudan. These conflicts stunted the growth of the region (pre-independence) and the newly independent country substantially from both a political and economic perspective. As a result, when it gained its independence in 2011, South Sudan had very limited public infrastructure, a weak public health system and minimal human capital, driven by a poor education system and a populace with high rates of illiteracy and minimal schooling. Since this time, South Sudan has faced substantial internal conflict, involving the mobilization of local militias around an array of national and parochial issues, including the heavy politicization of Dinka and Nuer ethnic identities.

The civil war in South Sudan began in 2013, partly over political divides between President Salva Kiir and the then Vice President Riek Machar,<sup>18</sup> but also partly due to rural/urban tensions and public anger at

<sup>16</sup> World Bank. (2017). South Sudan Economic Update: Taming the Tides of High Inflation. Retrieved from <http://documents.worldbank.org/curated/en/806291508505062484/pdf/120563-WP-SSEUUpdatefinal-PUBLIC.pdf>

<sup>17</sup> *Ibid.*

<sup>18</sup> Council on Foreign Relations. (2018). Global Conflict Tracker: South Sudan Civil War. Retrieved from <https://www.cfr.org/interactives/global-conflict-tracker?marker-7#!/conflict/civil-war-in-south-sudan>

political elites. There are potential ethnic undertones to the civil war as well. The Compromised Peace Treaty was signed in August 2015, but fighting broke out again soon after. Eventually, a ceasefire was declared in 2017, but it was immediately breached soon after. In mid-2018, a peace agreement was signed, but its implementation at the time of this study's writing is still in discussion.

The conflict has also resulted in massive forced displacement of populations. Of a total population of approximately twelve million people, roughly four million have been displaced, approximately half as internally displaced persons (IDPs) and the other half fled as refugees to neighbouring countries.<sup>19</sup> Additionally, the fighting has occurred in key agricultural regions of the country devastating an already weak economy and resulting in deadly and recurrent famine. Finally, the enlistment of child combatants is also a challenge as it was a major concern during the Sudanese civil war and has continued in South Sudan after the December 2013 crisis as children are still encouraged and coerced to join all of the fighting factions in the country.<sup>20</sup> The recruitment of child soldiers results in a large number of young ex-combatants in the country who have little or no education, no skills other than fighting, and who need to be re-integrated into society, economy and education systems that are ill-prepared to receive them.

## 1.2. Labour Markets and Development

The economic and security issues South Sudan faces provide some context for a discussion of its labour market and strategies to improve it. They should also help shape reasonable expectations of how much impact different approaches can have on labour markets – the potential impact of a good policy to improve labour demand will be limited if there is continued violence and a volatile currency depreciating vis-à-vis the dollar.

One strategy for improving a country's economic development is optimising its labour markets. Efficient labour markets ensure that nations' economies are performing as well as can be expected given a country's population and its areas of inherent comparative advantage. However, improvements in market efficiency cannot fully compensate for issues associated with conflict or a lack of infrastructure.

Notwithstanding the challenges noted above, labour market theory suggests several components that are critical for these markets to thrive. South Sudan can focus on these areas to help improve its labour markets. The most productive labour markets have several key characteristics: a strong stream of job seekers, high demand for those labourers (and the skills that they possess) and efficiency within the market. This can be broken into four broad areas: labour supply, labour demand, transaction costs and information costs. All four aspects of a labour economy intersect and interact to form the basis of a successful labour market. Programmes and policy interventions can help strengthen these components, particularly the first two.

## 1.3. Limited Labour Supply

One of the most common targets of labour market strategies is to improve the supply of labour. This ideally means improving the quantity of skilled potential workers coming into the economy. A strong

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<sup>19</sup> US Agency for International Development. (2017). South Sudan – Crisis: Fact Sheet. Retrieved from [https://www.usaid.gov/sites/default/files/documents/1866/south\\_sudan\\_cr\\_fs09\\_07-10-2017.pdf](https://www.usaid.gov/sites/default/files/documents/1866/south_sudan_cr_fs09_07-10-2017.pdf)

<sup>20</sup> Morgan, H. (12 February 2018). Recruitment of child soldiers still rising in South Sudan. Al Jazeera News. Retrieved from <https://www.aljazeera.com/news/2018/02/unicf-road-soldier-child-biggest-challenge-180212102306805.html>



supply of labour comes from several factors, one of which is the age of the population. In general, a country's labour market benefit from a younger population as a young population guarantees the supply of many years of labour. In South Sudan, the population demographics represent an area of promise, with young people (age 29 and under) representing 70% of the country's population.<sup>21</sup> If trained well, this young population would offer many years of productive work to the labour market.

Another factor is human capacity, commonly seen through an education system or a parallel system that gives the labour force a useful set of skills they can use to obtain and keep good jobs. The education system includes regular schooling, vocational schooling or vocational training, all of which would help supply young people with quality skills relevant for the job market. South Sudan also has an Alternative Education System (AES) in place, a system specifically for students who either have never accessed education before or have dropped out.<sup>22</sup> The parallel system includes apprenticeships, mentoring and other informal means of obtaining skills.

Within the formal education system, most South Sudanese do not complete their schooling. At the primary level, almost 75% of all six-year-olds and 59% of seven-year-olds were out of school in 2015.<sup>23</sup> For secondary school-aged children/youth, more than 50% in most parts of the country were also found to be out of school in 2015 with out of school rates for girls in rural areas reaching 75%.<sup>24</sup> This gender disparity makes it more likely for women to face additional challenges to enter vocational training programmes which often require primary education experience.<sup>25</sup> Overall, 2.2 million children are out-of-school in South Sudan, and given the ongoing conflict resulting in mass displacement and refugees, the number is likely to increase – refugee children are five times more likely to be out-of-school.<sup>26</sup> Low levels of human capital in the form of lack of literacy, numeracy and basic training in math, science, computer science or business pose a significant barrier for economic growth.<sup>27</sup> In South Sudan, the state of the education system has had a significant effect on the levels of basic skills among the population – almost half (42%) of the population of South Sudan cannot read or write in any language,<sup>28</sup> and 72% of adults are illiterate.<sup>29</sup>

Additionally, even in cases where students are able to attend school regularly, schools themselves often have severely limited resources. The most common challenges facing schools are: conflict, poor facilities, poor sanitation, limited resources, a lack of teachers, limited oversight and strong gender and

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<sup>21</sup> United Nations, Department of Economic and Social Affairs. (2017). World Population Prospects: The 2017 Revision, custom data. Accessible via <https://www.un.org/development/desa/publications/world-population-prospects-the-2017-revision.html>

<sup>22</sup> UNESCO. (2018). Global Initiative on Out-of-School Children South Sudan Country Study." Retrieved from <http://uis.unesco.org/sites/default/files/documents/global-initiative-out-of-school-children-south-sudan-country-study.pdf>

<sup>23</sup> *Ibid.*

<sup>24</sup> *Ibid.*

<sup>25</sup> UNESCO. (2018) South Sudan Education and Literacy Data. Retrieved from <http://uis.unesco.org/country/SS>

<sup>26</sup> UNESCO. (2018). Global Initiative on Out-of-School Children South Sudan Country Study." Retrieved from <http://uis.unesco.org/sites/default/files/documents/global-initiative-out-of-school-children-south-sudan-country-study.pdf>

<sup>27</sup> World Bank. (2015). Republic of South Sudan: Systematic Country Diagnostic. Retrieved from <http://documents.worldbank.org/curated/en/952191472743836373/pdf/99383-CAS-SecM2015-0302-IDA-SecM2015-0208-IFC-SecM2015-01>

<sup>28</sup> Data analysis from World Bank's South Sudan High Frequency Survey, Wave 4 (2017). Accessible via <http://microdata.worldbank.org/index.php/catalog/2916>

<sup>29</sup> World Bank. (2015). Republic of South Sudan: Systematic Country Diagnostic. Retrieved from <http://documents.worldbank.org/curated/en/952191472743836373/pdf/99383-CAS-SecM2015-0302-IDA-SecM2015-0208-IFC-SecM2015-01>

rural/urban disparities.<sup>30</sup> In the former Western Equatoria State, one study found that conflict resulted in the closing of many schools, and those that remained open were poorly equipped, lacking learning materials and resources, permanent classrooms, adequate numbers of skilled teachers, sanitary facilities and regional supervision.<sup>31</sup>

In Ikwoto County, a study found that 40% of students were sent home because of a lack of teachers, and only 28% of children aged 3-6 attended nursery school. They also had extreme variance in access to education as children in rural regions had substantially lower attendance rates up to three times lower than the overall county average.<sup>32</sup> The access to education variance also showed up in the Kapoeta region, where attendance rates were 20% on average, but as low as 0% in some areas particularly rural ones. Attendance dropped from primary to secondary school substantially, and there was a strong gender gap in education with girls attending school at about half the rate of boys.<sup>33</sup>

Many do not even partake in this poor education system. In a recent household survey of randomly selected urban areas in 7 of 10 former states in South Sudan, 61% said they were not currently attending any school or college and 63% had never attended any school. Finances play a substantial role – 53% said the main reason they did not attend school was a lack of money.<sup>34</sup>

Alongside the school system, there remains informal opportunities for South Sudanese to acquire skills for the labour market. Most prominent is the Alternative Education System (AES), which offers education opportunities for children and adults who never attended school or dropped out and are unlikely to enrol again. The AES system has seven components: Accelerated Learning Programmes (ALPs), Community-based Girls' Schools (CGS), Adult Education, Intensive English Courses (IECs), Interactive Radio Instruction (IRI), Pastoralist Education and Agro-forestry Education. This system was established in 2002 and is the second largest part of the education system. Most enrollees in the AES are in ALPs, which offer an accelerated primary school cycle, condensing eight years of primary schooling into four years. There is also vocational and technical training available in a number of specialty schools. They offer training in several areas, most prominently, in tailoring, auto repair, carpentry, computers and masonry. They also offer education in English and adult literacy.<sup>35</sup>

Besides a poorly trained supply of labourers, South Sudan also has many child labourers. This form of labour harms a nation's development as children are pulled from school long before they can gain skills like literacy, numeracy or even technical training in farming or construction to benefit the labour market. Based on 2016 data, child labour rates of children attending school in select locations were

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<sup>30</sup> UNESCO. (2018). Global Initiative on Out-of-School Children South Sudan Country Study." Retrieved from <http://uis.unesco.org/sites/default/files/documents/global-initiative-out-of-school-children-south-sudan-country-study.pdf>

<sup>31</sup> International Aid Services, Food for the Hungry, Doctors with Africa, et. al. (2017). Initial Rapid Needs Assessment (IRNA) Report, Mundri West and Mundri East Counties.

<sup>32</sup> AVSI: People for Development. (2017). Former Ikwoto County Multi-Sector Survey Report. In addition to Convention on the Rights of the Child, the Government of South Sudan has also ratified ILO C138 on minimum age for children to work and compulsory primary education and ILO C182 on abolition of worst forms of child labour.

<sup>33</sup> AVSI: People for Development (2017). Kapoeta Region Multi-Sector Survey Report.

<sup>34</sup> Data analysis from World Bank's South Sudan High Frequency Survey, Wave 4 (2017). Accessible via <http://microdata.worldbank.org/index.php/catalog/2916>

<sup>35</sup> World Bank. (2012). Education In The Republic Of South Sudan: Status And Challenges for a New System. Retrieved from <http://documents.worldbank.org/curated/en/787661468302991853/pdf/705950PUB0EPI0067902B09780821388914.pdf>

over 86%.<sup>36</sup> A population census study found that many children are forced into what is deemed as the worst forms of child labour<sup>37</sup> including slavery, debt bondage, serfdom, forced labour, the use of children for prostitution or pornography, drug trafficking or work that will harm the health or morality of children.<sup>38</sup> While the South Sudanese government did make some strides to combat child labour, it also had several major missteps,<sup>39</sup> making it unclear whether the government is committed to fighting this issue. Finally, some children are forced into armed groups, such as the national army or resistance groups, sometimes by force. The country faces a serious issue of how to re-integrate these children into society afterwards and the loss of potential skills (in return for skills in violence).

The extremely poor state of South Sudan's systems for human capital development has resulted in a workforce with limited productive skills to use to obtain jobs and few options for how to obtain these skills. This dearth of technical skills is likely why subsistence farming comprises a major part of the economy. Nationally, 65% of South Sudanese worked in agriculture, and most of that was subsistence farming – 19% were employed in industry and 15% in services.<sup>40</sup> Most people farm for a living in multiple parts of the country including the Kapoeta region, and Rubkona.<sup>41</sup> In some areas, including Limuru and Yei, farmers bring their surplus crops to the market. They also raise livestock or fish.<sup>42</sup> Additionally, some work in animal husbandry as is the case in the Upper Nile State.<sup>43</sup>

There are two major sources of potential improvement regarding labour supply in South Sudan. First, despite the troubling state of the economy, the population does not lack motivation as 78% of respondents from a survey of urban areas throughout the country were ready to work immediately.<sup>44</sup> They may not have the skills to obtain jobs, and there may also be a general dearth of jobs, but most people who are unemployed express a strong desire to seek employment. Second, a sizable amount of the population is young. As noted above, a larger young population offers a potentially good skilled supply of labour, and one that could be in the workforce for a prolonged period of time. In South Sudan,

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<sup>36</sup> UNESCO. (2018). Global Initiative on Out-of-School Children South Sudan Country Study." Retrieved from <http://uis.unesco.org/sites/default/files/documents/global-initiative-out-of-school-children-south-sudan-country-study.pdf>

<sup>37</sup> The definition comes from Article 3 of the International Labour Organization Convention #182: <http://www.ilo.org/ipecc/facts/WorstFormsofChildLabour/lang--en/index.htm>

<sup>38</sup> US Department of Labour. (2016). South Sudan: No Advancement – Efforts Made but Complicit in Forced Child Labour. Accessible via <https://www.dol.gov/sites/default/files/images/ilab/child-labour/SouthSudan.pdf>

<sup>39</sup> It never brought anyone to justice over child labour; it did not accede to the UN Convention on the Rights of the Child (UN CRC) and it did not convene its own National Steering Committee on Child Labour South Sudan: No Advancement – Efforts Made But Complicit In Forced Child Labour. (2015). US Department of Labour. Retrieved from <https://www.dol.gov/agencies/ilab/resources/reports/child-labour/south-sudan>

<sup>40</sup> ILO. (2018). South Sudan - The Private Sector and Job Creation: Matchmaking. See also ILO. (2018). South Sudan Main Statistical Indicators. Accessible via [http://www.ilo.org/gateway/faces/home/statistics?locale=EN&countryCode=SSD&\\_adf.ctrl-state=mtfeu7vg5\\_4](http://www.ilo.org/gateway/faces/home/statistics?locale=EN&countryCode=SSD&_adf.ctrl-state=mtfeu7vg5_4)

Among other fields, 19% of the population works in industry and 15% in services. Jobseekers and Enterprises in South Sudan's Capita (World Bank, 2014). Accessible via [http://cega.berkeley.edu/assets/miscellaneous\\_files/40-ABCA\\_-\\_Final\\_PSDP\\_MismatchPap-er.pdf](http://cega.berkeley.edu/assets/miscellaneous_files/40-ABCA_-_Final_PSDP_MismatchPap-er.pdf)

<sup>41</sup> See DTM South Sudan. (March-April 2017). Rubkona Report, Village Assessment Survey. See also AVSI: People for Development. (2017). Kapoeta region Multi-Sector Survey Report.

<sup>42</sup> Terre des hommes. (2017). Helping Children Worldwide, Assessment Report, Yei town Council, Yei River County, Yei River State-South Sudan.

<sup>43</sup> Alistar. (2015). Pastoralism and Conflict in Upper Nile State: Third Preliminary Report.

<sup>44</sup> Data analysis from World Bank's South Sudan High Frequency Survey, Wave 4 (2017). Accessible via <http://microdata.worldbank.org/index.php/catalog/2916>

the population is very young, with an estimated 70% age 29 or younger.<sup>45</sup> Unfortunately, per the educational shortcomings noted above, this group is severely lacking in skills for work and has limited means to obtain them.<sup>46</sup> As such, unemployment has been rising among this population.<sup>47</sup> This young population may also have a culture of dependency and entitlement, stemming from oil revenues and high foreign aid. As a result, one in two young adults expect a government job in the next two years with unrealistically high wages.<sup>48</sup>

#### 1.4. Limited Demand for Labour

In South Sudan, the low demand for labour is arguably the biggest challenge to the labour market.<sup>49</sup> Even though it is clear that the supply of skilled labour is quite weak, there appears to be little demand for labour as well. The country effectively does not have a national economy – rather the economy is a conglomerate of local economies that often operate in near isolation.<sup>50</sup> These local markets reflect the goods being produced and demanded in-country, which in turn suggests the type of labour that is in-demand. The result is a very limited demand for products that come from low-skilled labour like agriculture or household goods.<sup>51</sup> There are no major products produced by industries in South Sudan that could employ many seeking jobs.<sup>52</sup> Indeed, this is a major reason why most people do not have paid jobs – outside of subsistence farming, there is not that much available work. With low levels of wage employment, the informal economy (which local markets figure prominently in) plays a much larger role in the overall economy.<sup>53</sup> The increase in violence and rise in inflation, which played a major role in the downturn in the economy, also impacted demand in these markets. Low consumer incomes lowered demand for goods in multiple markets as did the decline in supply of some goods due to safety concerns.

There is very little data available regarding the number of domestic companies in country or any information on details of domestic firms.<sup>54</sup> One possible indicator of the size of the formal sector is the

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<sup>45</sup> United Nations, Department of Economic and Social Affairs. (2017). World Population Prospects: The 2017 Revision, custom data. Accessible via <https://www.un.org/development/desa/publications/world-population-prospects-the-2017-revision.html>

<sup>46</sup> Proloy Barua. (2015). Dynamics of Youth Unemployment Outlook in South Sudan.

[http://www.isprss.org/data/attachments/Youth\\_Unemployment\\_Outlook\\_in\\_South\\_Suda.pdf](http://www.isprss.org/data/attachments/Youth_Unemployment_Outlook_in_South_Suda.pdf)

<sup>47</sup> Ayach DJ. (2015) Effects of Youth Unemployment on Income in Central Equatoria, South Sudan. Accessible via [http://erepository.uonbi.ac.ke/bitstream/handle/11295/100173/Deng\\_Effects%20Of%20Youth%20Unemployment%20On%20Income%20In%20Central%20Equatoria%2C%20South%20Sudan.pdf?sequence=1&isAllowed=y](http://erepository.uonbi.ac.ke/bitstream/handle/11295/100173/Deng_Effects%20Of%20Youth%20Unemployment%20On%20Income%20In%20Central%20Equatoria%2C%20South%20Sudan.pdf?sequence=1&isAllowed=y)

<sup>48</sup> World Bank. (2014). South Sudan Jobs and Livelihoods.

<sup>49</sup> AfDB, OECD, UNDP and UNECA. (2012) South Sudan 2012. African Economic Outlook. Accessible via [http://www.youthpolicy.org/national/South\\_Sudan\\_2012\\_Youth\\_Unemployment\\_Briefing.pdf](http://www.youthpolicy.org/national/South_Sudan_2012_Youth_Unemployment_Briefing.pdf)

<sup>50</sup> Varela, Gonzalo; Cali, Massimiliano; Pape, Utz; Rojas, Esteban. (2016). Market Integration and Poverty: Evidence from South Sudan. Policy Brief Zambia;No. 7564. World Bank, Washington, DC. <https://openknowledge.worldbank.org/handle/10986/23903> License: CC BY 3.0 IGO.

<sup>51</sup> Reach Initiative. (2017). South Sudan: Understanding Markets Supply Chain Challenges Amidst Increasing Food Security Needs. Accessible via <http://www.reach-initiative.org/south-sudan-understanding-markets-supply-chain-challenges-amidst-increasing-food-security-needs>.

<sup>52</sup> US Central Intelligence Agency. (2017) The World Factbook: South Sudan. Accessible via <https://www.cia.gov/library/publications/the-world-factbook/geos/od.html>

<sup>53</sup> African Development Bank Group. (2018). South Sudan Country Note. African Economic Outlook. Accessible via [https://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/country\\_notes/South\\_Sudan\\_country\\_note.pdf](https://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/country_notes/South_Sudan_country_note.pdf)

<sup>54</sup> World Bank World Development Indicators. Accessible via <https://data.worldbank.org/>.

number of products the country produces for export. This data<sup>55</sup> shows practically no products beyond oil, illustrating just how limited the country's production capabilities are. This suggests the primary demand of goods produced in South Sudan is the domestic market, and the domestic market functions primarily through the local markets in towns and regions. A look at South Sudan's imports could also reveal the types of goods in demand, and hence, the type of labour that could be helpful for the labour market if those industries were in-country. The 2016 data<sup>56</sup> finds that the most imported products are vegetables and foodstuffs, products that, theoretically, could be made in South Sudan given the prominence of agriculture. Chemicals and plastics are also imported but at a much lower scale than the food and drink items.<sup>57</sup>

Local markets, where local vendors in towns or regions sell their products, are a major part of the nation's economy and reflect the dominance of the informal economy.<sup>58</sup> Examining these local markets can suggest the dominant forms of labour that are in-demand in South Sudan. The results suggest low-skilled labour especially in agriculture. Indeed, the goods sold in markets are fairly basic food items, clothing items or household goods. We can take local markets in former Unity state as an example. Markets in Pakur Payam sell sugar, tea leaves, soap, body cream, socks, female undergarments and used engine oil. The Boaw markets primarily feature sugar, cooking oil, soap, tea leaves and sweets. In Jaak Payam, they sell sugar, salt, dry okra and cooking oil, but no major food items because vendors carry goods on foot.<sup>59</sup> The Limuru markets sell a mix of non-food items like shoes, bags, clothes and some food commodities like rice, sugar, salt and oil.<sup>60</sup> This list of products, primarily agricultural or goods requiring low skills to produce, are indicative of the products in-demand in South Sudan, and, in turn, the type of labour in-demand in-country given the importance of local markets in the economy. The products that sell in these markets are the ones for which there are highest demand, and their local production requires only agriculture and comparatively unskilled labour. The finished goods such as clothing are imported from abroad and often second-hand.

The ongoing violence in the country has negatively impacted these small local markets as traders who sell their goods in these markets are often hesitant to travel to them on unsafe roads when there is an active threat of conflict. Some markets have closed altogether because of the threat of violence and a lack of supply of goods to the markets. Violence and uncertainty also affect the small formal sector that exists. Markets in Lainya Centre, Rubkona, Juba and former Western Equatoria State lost a substantial number of businesses because of loss of property and capital from the fighting; some markets closed

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<sup>55</sup> Harvard University. (2016). Atlas of Economic Complexity. Retrieved from <http://atlas.cid.harvard.edu/explore/?country=202&partner=undefined&product=undefined&productClass=HS&startYear=undefined&target=Product&tradeDirection=import&year=2016>

<sup>56</sup> *Ibid.*

<sup>57</sup> *Ibid.*

<sup>58</sup> Data is not particularly good for measuring the size of South Sudan's informal economy, but 76% of the population survives on subsistence activities, so the informal sector likely supports a vast majority of South Sudanese. See African Development Bank. (2013) South Sudan: A Study on Competitiveness and Cross Border Trade with Neighbouring Countries. Retrieved from [https://www.afdb.org/fileadmin/uploads/afdb/Documents/Project-and-Operations/South\\_Sudan\\_-\\_A\\_Study\\_on\\_Competitiveness\\_and\\_Cross\\_Border\\_Trade\\_With\\_Neighbouring\\_Countries.pdf](https://www.afdb.org/fileadmin/uploads/afdb/Documents/Project-and-Operations/South_Sudan_-_A_Study_on_Competitiveness_and_Cross_Border_Trade_With_Neighbouring_Countries.pdf). Frontier Economics. (2015). South Sudan: The Cost of War. Retrieved from <https://www.frontier-economics.com/documents/2015/01/south-sudan-cost-war.pdf>. Lamb, G. (2011). Assessing the Reintegration of Ex-Combatants in the Context of Instability and Informal Economies. The World Bank.

<sup>59</sup> CARE International, PAH and Nile Hope. (2017). Multi-Sector Rapid Needs Assessment: Northern Liech State Report: Greater Koch Region (Liech and Gany Counties), South Sudan, 6-10 April 2017.

<sup>60</sup> World Food Programme. (21 October 2017). Rapid Appraisal: Limuru, Yei State.

entirely as people had to hide in the bush for safety.<sup>61</sup> In the former state of Warrap, the movement of goods along supply routes has declined substantially due to conflict, and this has resulted in decreased supply and a corresponding rise in prices.<sup>62</sup>

The downturn in the economy also impacted demand in these markets. Low consumer incomes lowered demand for goods in multiple markets, including those in Boaw<sup>63</sup> and Kajo Keiji.<sup>64</sup> Other markets, such as those in Wau and Juba experienced an increase in demand but mostly due to food shortages as the urban population relies heavily on the markets for food.<sup>65</sup>

The low demand for labour outside of agriculture is also evident in unemployment figures. In a 2017 study by the World Bank, 70% of respondents from randomly selected urban households in a national survey from 14 states (seven urban, seven rural) in South Sudan had not performed any wage-earning work in the past week.<sup>66</sup> On a longer time-horizon, only 21% were salaried workers, and only 21% ran a business in the past year. 93% of people surveyed have not tried to find a job in the past four weeks (although about half of these were students) and 59% were unemployed for over a year. 49% of people said there were no job opportunities, and 38% reported that they had been seeking employment for over 12 months.<sup>67</sup> This all points to exceedingly low demand for labour outside of the informal sector particularly in agriculture.

There is some demand for technically skilled workers in South Sudan (especially in the oil industry), but those workers rarely exist given the poor state of education in the country. This plays poorly for businesses. The lack of highly skilled South Sudanese drives up wages for the very limited pool of qualified candidates. Often, this means hiring expatriates at these high wages, which then make it harder for these industries to be competitive as they have to overpay to hire qualified personnel. This is often a problem for professional workers, including engineers and accountants, whereby South Sudan's average wages end up almost 80% above the Common Market for Eastern and Southern Africa (COMESA) averages. Even average rural wage labour costs are substantially higher in South Sudan – daily wages are more than seven times more than neighbouring Uganda.<sup>68</sup>

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<sup>61</sup> Danish Refugee Council. (2017). Rapid Market Assessment Report to Investigate the Feasibility of Cash-Based Interventions in Guit, Koch and Rubkona Counties, United State (North Liech State), South Sudan, April, 2017. World Food Programme, Food and Agriculture Organization, UNICEF, National Bureau of Statistics. (2017). Food Security and Nutrition Assessment, Juba 2017, September-October, 2017.

International Aid Services, Food for the Hungry, Doctors with Africa, et. al. (2017). Initial Rapid Needs Assessment (IRNA) Report, Mundri West and Mundri East Counties, Western Equatoria State.

<sup>62</sup> MercyCorps. (2014). Be the change, Rapid Assessment of Markets, Warrap State: TWIC COUNTY and the Abyei Administrative Area (AAA).

<sup>63</sup> CARE International, Handicap International, Save the Children, et. al. (2017). Multi-Sector Rapid Needs Assessment: Northern Liech State Report: Greater Koch Region (Liech and Gany Counties), South Sudan.

<sup>64</sup> IRNA: South Sudan Food Security and Livelihoods Cluster. (2016). IRNA mission to Kajo Keiji FSC Input, 2-22 December 2016.

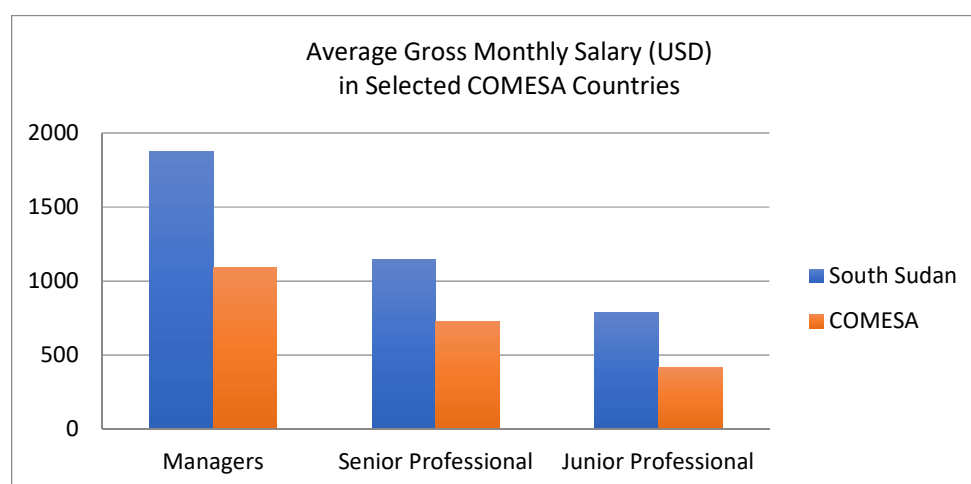
<sup>65</sup> Norwegian Refugee Council. (2017). Rapid Market Assessment Report: Wau County South Sudan. World Food Programme, Food and Agriculture Organization, UNICEF, National Bureau of Statistics. (2017). Food Security and Nutrition Assessment, Juba 2017, September-October, 2017.

<sup>66</sup> Data analysis from World Bank's South Sudan High Frequency Survey, Wave 4 (2017). Accessible via <http://microdata.worldbank.org/index.php/catalog/2916>.

<sup>67</sup> *Ibid.*

<sup>68</sup> World Bank. (2014) South Sudan Jobs and Livelihoods.

Figure 3: Average Gross Monthly Salary in Selected COMESA Countries



Source : South Sudan Jobs and Livelihoods. World Bank, November 2014.

### 1.5. Efficiency in Markets

If there is both a high supply of labour and high demand for that labour, the labour market still requires relatively low transaction costs in order for it to do well. Goods need to be able to move efficiently between places so that a surplus of production (e.g., agricultural foodstuffs) in one area can be used to offset a shortfall in production in another area. Countries having poor or non-existent roads cannot link markets and this leads to allocation inefficiencies that can slow growth or even end businesses when they are small, seasonal and sensitive to price-shocks. If the supply of electrical power in a country is sporadic, this will impact companies relying heavily on energy in their businesses, which will likely have negative effects on their work. If there is a limited or non-existent cold chain supply, any perishable products requiring temperature control will be at risk limiting a country's capabilities to store and transport some agricultural goods, chemicals and pharmaceutical drugs among many other products for any reach beyond the markets nearest to where they are produced. Hence, infrastructure is crucial in terms of allowing goods to move between markets achieving some level of allocation efficiency among local markets. When transaction costs are too high, market linkages are minimal and incentives for businesses to scale are minimal. The resulting hyper-localised markets have unpredictable supplies of products, volatility in prices and result in informal economies that seem unlikely to result in strong labour markets.

In South Sudan, markets are highly inefficient. Transaction costs are particularly high, given problems with infrastructure. Most prominently, South Sudan has the lowest road density in all of Africa, as less than 2% of the primary road network is paved.<sup>69</sup> There are only 0.2km of paved roads in South Sudan for every 1000 km<sup>2</sup> or 15km for every 1 million people. These numbers are substantially below average for all low-income fragile states or countries in Sub-Saharan Africa.<sup>70</sup> A 2017 World Bank survey found

<sup>69</sup> CARE International, PAH and Nile Hope. (2017). Multi-Sector Rapid Needs Assessment: Northern Liech State Report: Greater Koch Region (Liech and Gany Counties), South Sudan, 6-10 April 2017.

<sup>70</sup> African Development Bank. (2013). Infrastructure Action Plan in South Sudan: A Program for Sustained Strong Economic Growth. (Focus on Chapter 7 of report [Transport Infrastructure and Services.]) Retrieved from <https://www.afdb.org/en/infrastructure-action-plan-in-south-sudan-a-program-for-sustained-strong-economic-growth/>

that 49% of the respondents did not have access to any all-season roads.<sup>71</sup> The dire condition of infrastructure in South Sudan also impacts local markets as both suppliers and consumers need safe and reliable ways to travel to those markets. Supplies to the Pakur market in the Pakur payam in former Unity state take two to three days to get there by foot as the roads to the supplier market are in very poor condition. The traders at the Boaw market face a similar problem as the roads between markets are poor and there are bandits and gunmen along the way.<sup>72</sup> In former Western Equatoria State, market-goers risk being robbed by armed groups to the main markets.<sup>73</sup> Rubkona has a large market, but during rainy season, the roads become hard to access.<sup>74</sup> The same holds for the Wau markets – rain affects the roads substantially impacting market life.<sup>75</sup> Development of the transportation sector will be critical for exporting goods and moving them beyond local markets, particularly given the land-locked nature of South Sudan.<sup>76</sup>

Similarly troubling, particularly given the increased reliance on electronic devices, less than 2% of the population in South Sudan has access to electricity.<sup>77</sup> The country has the second lowest electricity power consumption in the world with only 40 kilowatt hours per capita.<sup>78</sup> This all suggests there is minimal power generation and usage in South Sudan, which does not bode well for industries that likely would require high levels of electricity. This also implies a poor or non-existent cold chain supply, which would limit any perishable products to being sold in local markets as they would likely get damaged in long transports – the transports would be long because of poor roads, and there would likely be poor cooling given the limited electricity use in-country.

Another major source of market inefficiency in South Sudan stems from the potential negative impacts of oil reserves on South Sudan's economy – what many scholars have referred to as a resource curse. While oil is a major source of revenue for the country, continued heavy investment in this industry harms others through effects on exchange rates, while putting the economy at risk with such a volatile product as oil. Oil could also be indirectly impacting the country's exports by discouraging diversification of products that manufacturers in South Sudan might conceivably bring to market. This would impact market efficiency; instead of strengthening other industries with resources that could employ many more people (like agriculture or construction), the country puts most of its resources into the petroleum industry that employs very few South Sudanese.

The general findings of research on the resource curse are: wealth from these resources leads to currency appreciation and harming exports in other sectors; domestic economic woes result in the

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<sup>71</sup> Data analysis from World Bank's South Sudan High Frequency Survey, Wave 4 (October 2017). <http://microdata.worldbank.org/index.php/catalog/2916>. This survey was of randomly selected households in urban areas in seven of ten states in South Sudan.

<sup>72</sup> CARE International, PAH and Nile Hope. (2017). Multi-Sector Rapid Needs Assessment: Northern Liech State Report: Greater Koch Region (Liech and Gany Counties), South Sudan, 6-10 April 2017.

<sup>73</sup> International Aid Services, Food for the Hungry, Doctors with Africa, et. al. (2017). Initial Rapid Needs Assessment (IRNA) Report, Mundri West and Mundri East Counties, former Western Equatoria State, 1-4 November 2017.

<sup>74</sup> Danish Refugee Council. (2017) Rapid Market Assessment Report to Investigate the Feasibility of Cash-Based Interventions in Guit, Koch and Rubkona Counties, United State (North Liech State), South Sudan.

<sup>75</sup> Norwegian Refugee Council. (2017). Rapid Market Assessment Report: Wau County South Sudan.

<sup>76</sup> World Bank. (2014). South Sudan Jobs and Livelihoods.

<sup>77</sup> World Bank. (2015). Republic of South Sudan: Systematic Country Diagnostic. Retrieved from <http://documents.worldbank.org/curated/en/952191472743836373/pdf/99383-CAS-SecM2015-0302-IDA-SecM2015-0208-IFC-SecM2015-01>

<sup>78</sup> World Bank World Development Indicators. Accessible via <https://data.worldbank.org/indicator/>



government using wealth to subsidise other sectors rendering them even less competitive; forced economic reliance on potentially volatile products and governments have wealth to buy off domestic criticism and avoid needed political or economic reforms.<sup>79</sup> It may also be that different types of governments are prone to negative (and positive) effects of being “cursed” with resources.<sup>80</sup>

This “curse” could apply to South Sudan’s economic development and growth, as the country’s heavy reliance on oil (which accounts for approximately 60% of its entire GDP)<sup>81</sup> likely plays a major role in the country’s overvalued exchange rate, weak non-oil export sector and poor economic governance that stem from easily captured oil rents for its government.<sup>82</sup> Heavy reliance on a volatile product as oil is also risky,<sup>83</sup> and declines in oil prices have harmed the country’s economy.<sup>84</sup>

The limitation of South Sudan’s exports illustrates the inefficiency produced from oil. The country exports very few items for which it has any sort of comparative advantage – oil, legumes, peanuts, timber and oil seeds comprise the full list of these products.<sup>85</sup> Additionally, these are peripheral products with limited linkages to others.<sup>86</sup> Linkages enable easier paths to economic diversification, which is beneficial for any economy’s growth. The skills required for someone to work in oil, for instance, cannot be easily transferred to another industry. It is not very easy to produce a different product with oil workers in the absence of substantial training on new skills. This is the basis of the product space analysis which looks at skill-set proximity of products produced by countries and the economic complexity of these products to analyse their economic growth possibilities.<sup>87</sup> For South Sudan, this is not promising at present – the products the country produces for export purposes are not closely related to other products that could be developed with time and investments in both human and financial capital. The resources invested in oil could be used to create greater efficiency in other products and industries that could both employ many more people and have greater linkages to other industries allowing for more rapid economic growth.

## 1.6. Specific Sectors

Although there are many sectors in South Sudan, agriculture and livestock remain one of the biggest sectors (next to the oil sector) in the country. Thus, this section will discuss the potential and challenges of these two sectors.

### Agriculture

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<sup>79</sup> Ross, ML. (2015). What Have We Learned about the Resource Curse?. *Annual Review of Political Science*, 18: 239–259.

<sup>80</sup> Liou, YL, &, Musgrave, P. (2014). Refining the Oil Curse: Country-Level Evidence from Exogenous Variations in Resource Income. *Comparative Political Studies*, 47(11): 1584 – 1610.

<sup>81</sup> South Sudan Economic Outlook. African Development Bank. Retrieved from <https://www.afdb.org/en/countries/east-africa/south-sudan/south-sudan-economic-outlook>. World Bank. (2014). South Sudan Jobs and Livelihoods. World Bank. South Sudan Overview. Retrieved from <https://www.worldbank.org/en/country/southsudan/overview>.

<sup>82</sup> World Bank. (2014). South Sudan Jobs and Livelihoods.

<sup>83</sup> *Ibid.*

<sup>84</sup> Sudan Tribune. (4 December 2017). S. Sudan optimistic rising oil prices will boost economy. Retrieved from <http://www.sudantribune.com/spip.php?article64176>

<sup>85</sup> This means products that it exports (as a share of its global exports) at a higher rate than the global average of those exports as a share of total global exports. For example, if a product is 50% of its global exports, but that same product is only 25% of the world’s total global exports, South Sudan has a comparative export advantage for it.

<sup>86</sup> Harvard University Centre for International Development. The Atlas of Economic Complexity. Retrieved from <http://atlas.cid.harvard.edu/explore/network/?country=202&partner=undefined&product=undefined&productClass=HS&startYear=undefined&target=Product&year=2016>

<sup>87</sup> Hidalgo, C. A., Klinger, B., Barabási, A. L., and Hausmann, R. (2007). The product space conditions the development of nations. *Science*, 317(5837), 482-487.

The largest sector in the labour market in South Sudan is agriculture. The Food and Agriculture Organization of the United Nations (FAO) notes that 90% of South Sudanese depend on farming, fishing, or herding for food or income needs. Most livelihoods are in unpaid agriculture and pastoralist work. The International Labour Organization (ILO) estimates 65% of all employment in the country is in agriculture. A survey found that 48% of South Sudanese make their living through crop farming. This sector, thus, is critical for the labour market. The agriculture sector in South Sudan produces food and cash crops including sorghum, maize, pigeon peas, vegetables, rice, coffee, bananas and pineapples. There are areas of the country, particularly the Green Belt zone, that have untapped potential for further crop production.

The sector is vital to the livelihood for the vast majority of the population, particularly the cereals sub-sector. Given the high level of food insecurity in South Sudan, improving agricultural productivity is critically important for the domestic market as it would improve the supply of food in-country. There are also opportunities to improve both the export market and limit the importing of agricultural products. Given the number of farmers and the high amount of fertile land that is being unused – out of approximately 64 million hectares of land, 32 million are arable and have great agricultural promise - it is certainly conceivable for South Sudan to increase its exports of agriculture with improvements in the sector. This would help the large number of South Sudanese who work in the sector many who currently do so without pay.

The main challenges South Sudan faces in this sector limit its productivity substantially but can be seen as opportunities. As noted above, one major challenge is the marginal use of available arable land – there are many extremely fertile areas of the country that are currently not being used at all, although it is unclear whether the land is public or private, and the reason behind the lack of use is under explored. There are also poor farming techniques and methods used by farmers, along with limited access to quality seeds and planting materials. Finally, farmers face very lean profit margins given the high costs of transportation, the country's poor infrastructure and high taxes.

An effort to improve these areas of inefficiency in the agriculture sector could have a major impact on the labour market. Given the high number of South Sudanese that work as farmers, improving productivity could help supply the domestic market, and possibly create opportunities to export to the international market. Both would ultimately result in more jobs and money for farmers in South Sudan.

### Livestock

The livestock subsector is also critical to the country's labour market as most South Sudanese participate in it with 85% of the population owning at least one animal.<sup>88</sup> It is quite large supporting 950,000 livestock farmers, 350,000 herders, 4,500 animal traders, 2,000 slaughter personnel, 2,000 to 4,000 butchery owners and 500 commercial kraal operators.<sup>89</sup> This subsector is extremely valuable, with the value of livestock products at \$2.48 billion in 2013 contributing a total of \$3.17 billion to the South Sudanese economy.<sup>90</sup> The overall livestock population is difficult to measure, but FAO estimated in 2009

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<sup>88</sup> International Center for Agricultural Research in the Dry Areas (ICARDA). (2012). Poverty Assessment Southern Sudan. ICARDA, Aleppo, Syria. vi and p. 55.

<sup>89</sup> Onyango, Diana, George Oyoko, Robert Too and Rachael Masake. (2015). The Contribution of Livestock to the South Sudan Economy. IGAD Centre for Pastoral Areas and Livestock Development (ICPALD).

<sup>90</sup> *Ibid.*

that there were a total of 36 million animals of which 11.7 million were cattle, 12.4 million were goats and 12.1 million were sheep.<sup>91</sup> Given South Sudan's relatively small population, this gives the country the highest livestock per capita holding in all of Africa. The main livestock products are meat, dairy, hides, skin and eggs.<sup>92</sup>

Livestock represent the main source of livelihood for a large share of the population with herds (mostly cattle) prominent in floodplains and semi-arid areas particularly in western parts of the former Upper Nile state and in the former Eastern Equatoria, Jonglei and Bahr El Ghazal states. Livestock are raised by nomads or semi-nomads and their success depends entirely on access to grazing land and water. Livestock, particularly cattle, are also valuable in case of crop failure, as they can provide some level of food security for families.

Cattle are the most important livestock worth \$1.87 billion or 62% of the total livestock contribution to the agricultural sector, 13.6% of the country's total economy, and they supply 65% of South Sudan's red meat.<sup>93</sup> Cattle are a sign of status and wealth in the country; they are often slaughtered for cultural purposes, used for dowry, bartered for grain or used to pay penalties.<sup>94</sup> They also are critical sources of milk and figure prominently in the health of pregnant or lactating women and children.

Despite the large size of the livestock subsector in South Sudan, the income generated by this subsector only hit about 20% of its potential. There are several reasons for this. First, and most prominent, is the rise in conflict since 2013. It has led to herd sizes in affected areas being reduced 40-60%.<sup>95</sup> There has also been a rise in disease outbreak partly due to livestock being moved for safety reasons.<sup>96</sup> There are also poor animal health services and poor husbandry practices, which contribute to the heightened diseases among livestock. This rise in disease and death of livestock impact malnutrition, particularly for pregnant and lactating women and children who rely on cattle for milk.<sup>97</sup>

While some farmers have consistently moved their livestock because of conflict, there has also been a rise in sedentary farmers, reducing the amount of grazing land available. The livestock in-country are all indigenous breeds and have not been upgraded for generations resulting in lower productivity. There are also inadequate animal feeds, which come about from inadequate grazing practices, poor pasture and water management and limited supplements in animals' diets.

For livestock, especially cattle, the cultural issues are a major challenge. There is limited business orientation of the subsector, the private sector is still new and small and there are few people with strong business management skills to help accelerate progress. As a result, only a small fraction of the

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<sup>91</sup> *Ibid.*

<sup>92</sup> *Ibid.*

<sup>93</sup> Taban, A.J., Emmanuel, Kabwanga Ismail Tijjani, and Ahmet Çakır. (2018). "Challenges and Possible Improvement Of Livestock Sector In South Sudan: Review Paper." International Journal of Research - Granthaalayah, 6(2), 214-223. Accessible via <https://doi.org/10.5281/zenodo.1194652>.

<sup>94</sup> *Ibid.*

<sup>95</sup> Onyango, Diana, George Oyoko, Robert Too and Rachael Masake. (2015, December). The Contribution of Livestock to the South Sudan Economy. IGAD Centre for Pastoral Areas and Livestock Development (ICPALD).

<sup>96</sup> FAO. (2014). Growing concern for South Sudan's herders as conflict displaces millions of cattle. Accessible via <http://www.fao.org/news/story/en/item/273819/icode/>

<sup>97</sup> *Ibid.*

commercial value of livestock is being realised in South Sudan. The main value is usually limited to the sales of red meat in local markets.

There are consequences for the cultural approach to livestock. First, there is a real need for food in South Sudan to minimize food insecurity both from the lack of food and the lack of income from sales to buy food. There is also an overgrazing problem resulting from the extremely large population of livestock in South Sudan. For both these issues, lowering the number of livestock through an increased commercial approach to the subsector would help. There are also very few livestock markets for farmers to buy and sell their animals – this low number of markets serves as a hindrance to the commercialization of the industry.

Finally, the overall weak private sector in South Sudan makes starting and running agro-businesses challenging. In addition, inadequate or costly labour, unclear land tenure rules, high transportation costs and high and multiple levels of taxation also hinder the increased commercialization of the livestock subsector impacting the labour market.

Given the high number of livestock, and the fact that most South Sudanese own animals, the livestock subsector has great importance to the labour market. There are numerous inefficiencies in this market as noted above. If there are efforts to address these issues, it could have a major impact on the state of the country's overall labour market as many South Sudanese could improve their livelihoods through their livestock

It is against these market dynamics, efficiencies, inefficiencies, existing structures and sectoral interests that the labour market and TVET/VT/skills development assessment were conducted in order to better understand market demands for skills training, to inform planning and provision in the future.

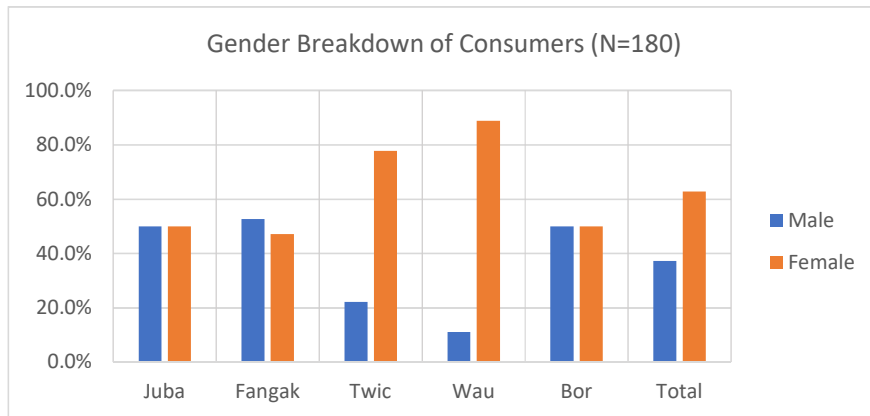
## 2. Key Findings from Select Locations in South Sudan

### 2.1. Consumer's Perspective

#### 2.1.1. Consumer Demographics

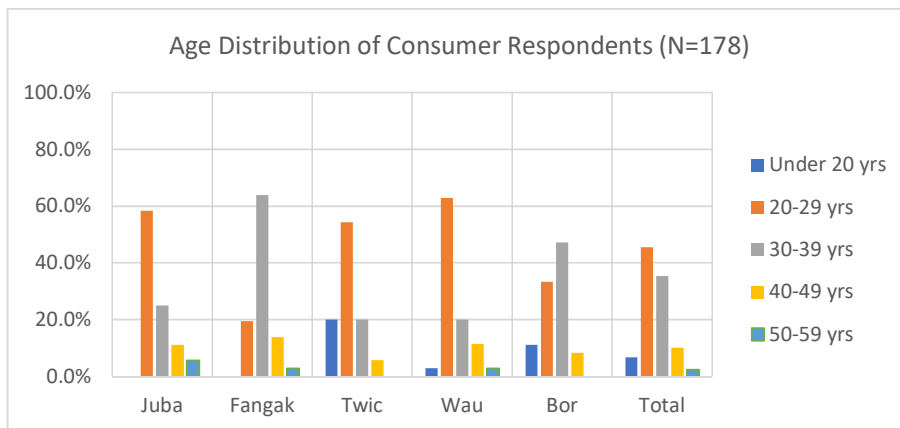
All consumers surveyed were South Sudanese nationals. The gender and age distribution of respondents, illustrated below, differed across locations while their marital status was predominantly married.

Figure 4: Gender Breakdown of Consumers



In Juba, the sample was equally represented by male (50%, N=18) and female (50%, N=18) consumers. The sample is quite young as slightly over half (N=21) of all respondents were young persons between the age of 20 and 29 years, followed by those aged 30 to 39 years (25%, N=9). A majority were residents of Juba. Juba-based consumers tended to have medium sized households with 66.7% (N=24) reporting that they have five to nine persons in their household. Also, although 36.1% (N=13) had completed secondary schooling, one in five Juba consumers surveyed had not received any form of education.

Figure 5 : Age Distribution of Consumer Respondents



Fangak had a slightly higher representation of male consumers (52.8%, N=19) compared to Juba. However, the age trends indicate that Fangak consumers come from a slightly older age bracket with a

majority of 63.9% (N=23) of respondents falling in the 30 to 39 years old age group. In terms of residence status, nearly half of Fangak consumers were local residents (55.6%, N=20), followed by a considerable number of IDPs (41.7%, N=15) and one returnee. The household sizes varied with one in three respondents coming from a 10- to 15-member household and one in five coming from a 16- to 20-member household. The majority of the sample had some primary or secondary schooling experience, although, similar to Juba, one in five of Fangak respondents did not have any education. Very few (8.3%, N=3) had completed university studies.

Twic had a skewed gender ratio with a significant majority of 77.8% (N=28) of the sample comprising of female consumers. In terms of age, the sample was young as one in four respondents was below 20 years old and 54.4% (N=19) were between 20 and 29 years old. Consequently, the sample from Twic had more unmarried respondents than other locations. The education distribution was similar to other locations with 33.3% (N=12) reporting that they had received no education and 36.1% (N=13) with some primary schooling experience.

Wau, similar to Twic, had a very high proportion of females (88.9%, N=32) while the age distribution is similar to that of Juba, with a majority of respondents aged between 20 and 29 years old. Another market assessment conducted by GIZ in Wau confirms this trend as the study found that customers in Wau were typically women with little disposable income.<sup>98</sup> Wau has the largest proportion of small sized households amongst all locations with slightly less than half of the Wau sample coming from 1 to 4 member households. Well over half (52.8%, N=9) of all Wau consumers had some primary school experience although one in five had not received any schooling. All consumer respondents from Wau were internally displaced persons, which is expected because the survey in Wau was conducted in Wau PoC.

Bor had equal representation of male and female consumer respondents. A bulk of the sample was made up of respondents between 20 to 39 years. A majority (61.1%, N=29) were residents while a third were returnees. Most respondents (58.3%, N=20) came from households of five to nine persons. Educational attainment of respondents was low, with 30.6% (N=11) of the respondents reported having no education and 22.2% (N=8) having received some primary education only. Demographic data from the Bor Food Security Analysis report led by FAO, WFP and NBS confirms the low prevalence of education in Bor.<sup>99</sup>

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<sup>98</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

<sup>99</sup> FAO, WFP and NBS. (2017). *Bor Urban Food Security and Nutrition Assessment Report*.

## Consumer Household Income

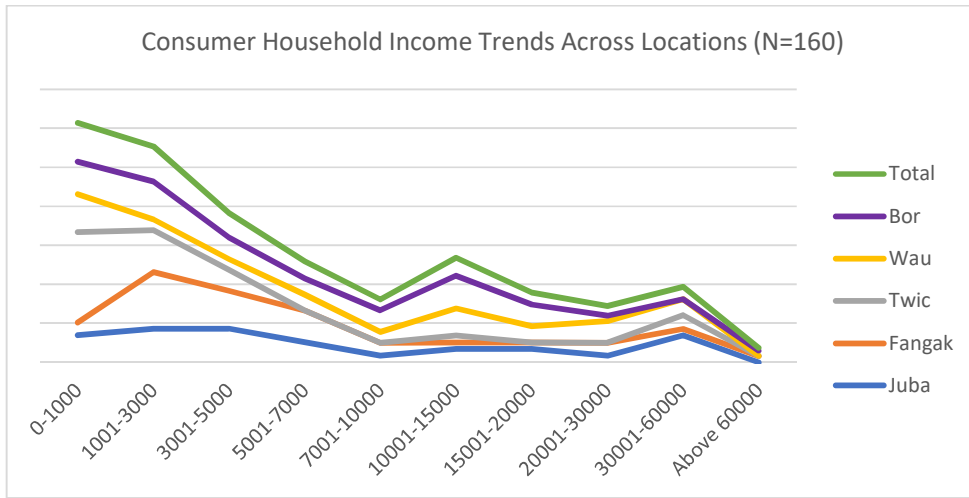
Table 3: Consumer Household Income in the Last Month, by Location (in SSP)

Income bands	Juba (N=29)	Fangak (N=31)	Twic (N=28)	Wau (N=36)	Bor (N=36)	Total (N=160)
0-1000	13.8%	6.5%	46.4%	19.4%	16.7%	20.0%
1001-3000	17.2%	29.0%	21.4%	5.6%	19.4%	18.1%
3001-5000	17.2%	19.4%	10.7%	5.6%	11.1%	12.5%
5001-7000	10.3%	16.1%	0.0%	8.3%	8.3%	8.8%
7001-10000	3.4%	6.5%	0.0%	5.6%	11.1%	5.6%
10001-15000	6.9%	3.2%	3.6%	13.9%	16.7%	9.4%
15001-20000	6.9%	3.2%	0.0%	8.3%	11.1%	6.3%
20001-30000	3.4%	6.5%	0.0%	11.1%	2.8%	5.0%
30001-60000	13.8%	3.2%	7.1%	8.3%	0.0%	6.3%
Above 60000	0.0%	3.2%	0.0%	0.0%	2.8%	1.3%
Don't know	6.9%	3.2%	10.7%	13.9%	0.0%	6.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

As indicated in Table 3, Juba appears to have a handful more of consumers earning in the high bracket of 30001-60000 SSP compared to other locations. Wau and Bor had a slightly higher proportion of consumers who had medium-high incomes between 10001-30000 SSP. Twic had the highest proportion of low household income bracket as almost half of the respondents reported (46.4%, N=17) earning less than 1000 SSP in the previous month.

As demonstrated by the income trend lines below, the household income for surveyed consumers has similar distributions across all locations. Most people have income in the range of 0 to 3000 SSP as well as a smaller but distinguishable peak at the 10001-15000 SSP level. Figure 6 is a stacked line chart which aims to demonstrate income trends rather than income distribution. In stacked line charts, each trend line treats the previous trend line as its base line instead of using the horizontal axis to plot a data finding.

Figure 6: Consumer Household Income Trends Across Locations



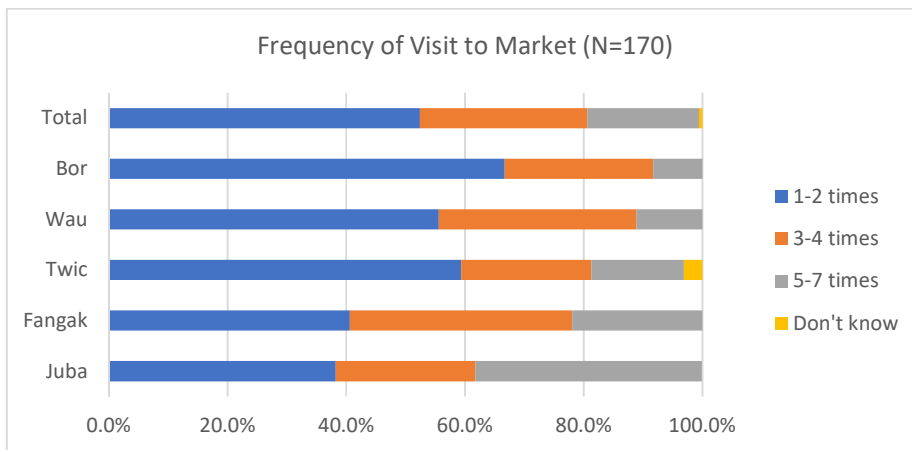
2.1.2. Interaction with Markets

Market Visit Trends

The markets surveyed were reported to be the primary market<sup>100</sup> for all consumers surveyed in Fangak, Wau and Bor. In Juba and Twic, however, 14.7% (N=5) and 12.5% (N=4) of the consumers said that the market surveyed was their secondary market. A sizable portion (slightly over a third) of all consumers do also visit other markets other than their primary market.

Of the consumers surveyed, 94.4% had visited a market in the previous seven days, thus fulfilling the eligibility criteria to respond to questions regarding their market habits. A near-majority of respondents across all locations were using their local market as their primary market and walking was the overall most common mode of transport.

Figure 7: Frequency of Visit to Market

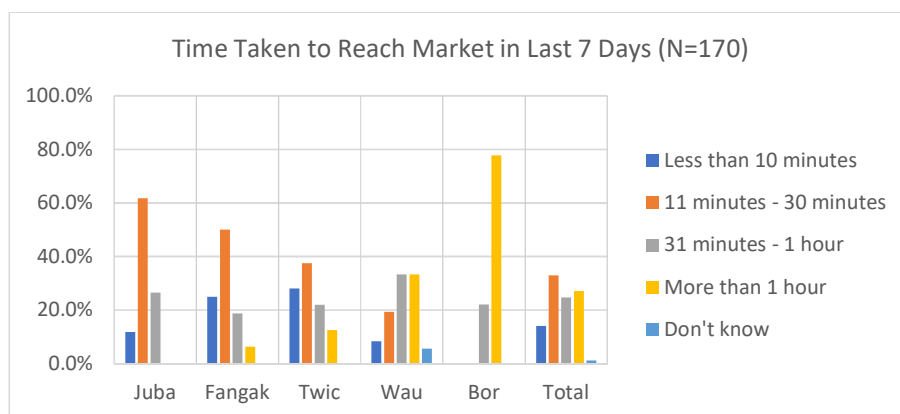


<sup>100</sup> A primary market is defined as the market where a consumer buys or avails a majority of their essential day-to-day items and services. A secondary market is considered one where a consumer buys items or services not usually available in their primary market.



In Juba, 38.2% (N=14) of respondents reported visiting the market one to two times in the past week, while Juba was also the only location to have maximum proportion of respondents (38.2%, N=14) visiting the market five to seven times a week. Over half of the respondents in Bor, Wau and Twic had visited the market one to two times in the past week. In Juba, Fangak and Twic, a majority took 11 to 30-minute walk to reach the market, followed by a small minority who took 31 minutes to an hour. In Wau and Bor, however, the trend was reversed as most took between 31 minutes to over an hour to get to the market as shown in the figure below.

Figure 8: Time Taken to Reach Market in last 7 Days



In Fangak, 40% (N=14) of consumers surveyed said they had visited the market one or two times while 37.5% (N=13) had visited the market three to four times in the previous week. A segment of the consumers visited more often, around 5 to 7 times a week, as was stated by one in five Fangak consumers surveyed. A few respondents reported that they also travel to another market one to three times a month. Nearly all other respondents stated that they walk to market.

In Twic, a handful of consumers (9.3%, N=3) reported using their private vehicle to get to the market. Furthermore, one in five of the consumers from Twic said they travel between one to three times a week to another market in addition to their primary market.

The market in Wau seemed to be serving people who also live a bit farther away as 19.4% (N=7) said they travelled in a boda boda or motorbike followed by 16.7% (N=7) who used a microbus/matatu to reach the market. Also, around 38.8% (N=14) of Wau consumers said they travel to a second market several times a week. Wau in particular was described in a GIZ market assessment as a historic trading town: “[Wau] is directly linked to Aweil and Kwajok by road and to Juba via Rumbek. The main market sells agricultural produce, textiles and offers services. There are a few smaller secondary markets in Wau in addition to a livestock market in Bahr al Shargui (on the western side of town).”<sup>101</sup> An NRC report affirms that Wau town is a feeder market, one which supplies other surrounding towns like Aweil, Tonj, Rumbek and Kwajok, which contributes to high demand and an increase in prices.”<sup>102</sup>

<sup>101</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

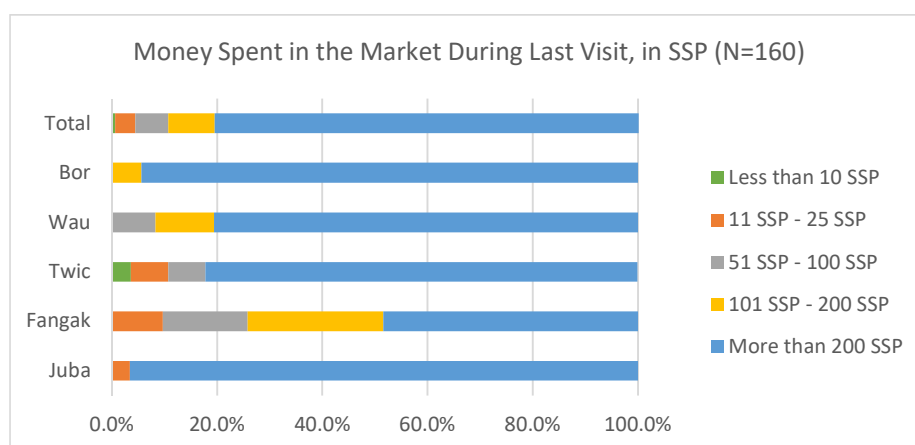
<sup>102</sup> Norwegian Refugee Council. (2017). *Rapid Market Assessment Report; Wau County South Sudan*. June 2017.

In Bor, very few people go to the market more than one to four times a week. A handful (16.7%, N=6) reported using a boda boda to travel to the market and 27.7% (N=10) said they travel to secondary market two to three times a week.

Regarding the secondary locations in the former state of Jonglei, 73% of people in Twic East and 81% of people in Duk were from the boma where the market was located and the interview took place. By contrast, less than half of respondents in Pibor were from the boma where the market was located and customers from other bomas visited the Pibor market.<sup>103</sup> About 59% of Duk county residents also travelled to other markets to purchase specific goods, but only 37% of Pibor residents and 30% of Twic East residents did the same. Frequency of visits also differed between the locations, with respondents in Duk visiting other markets once a week or daily, while those in Pibor visit two to three times per week, and those in Twic East do so two to three times per month. Duk consumers visit other markets primarily in search of vegetables and medicines.<sup>104</sup>

### Level of Expenditure in Market

Figure 9: Money Spent in the Market During Last Visit, in SSP



The level of expenditure among Juba's consumers was the highest, followed by Bor, Wau and Twic. Fangak had the lowest levels of expenditure with over 50% of respondents reportedly spending 200 SSP or less in the market during their last visit.

Data revealed that a certain proportion of respondents are highly financially vulnerable. For instance, among the respondents who reported spending less than 100 SSP in the last week, 5.6% (N=9) of them have a household size of five to nine members while 2.5% (N=4) have 10 to 15 members in their households. A few outliers were observed, such as a few who spent less than 20 SSP but were under 20 years old, presumably very young persons who may not be the sole earner and buyer for their household.

<sup>103</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC. April 2017

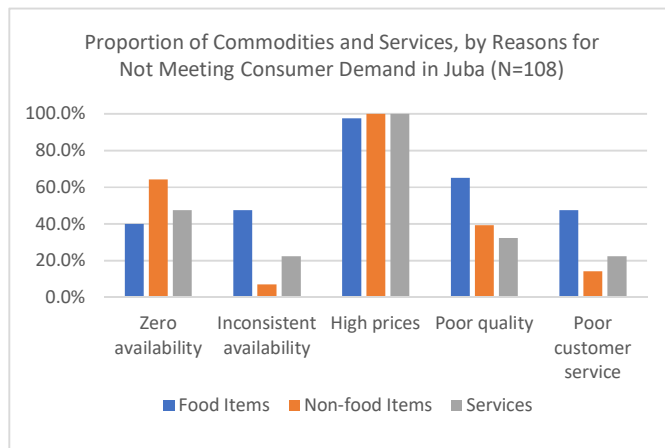
<sup>104</sup> *Ibid.*

### 2.1.3. Satisfaction with Goods and Services

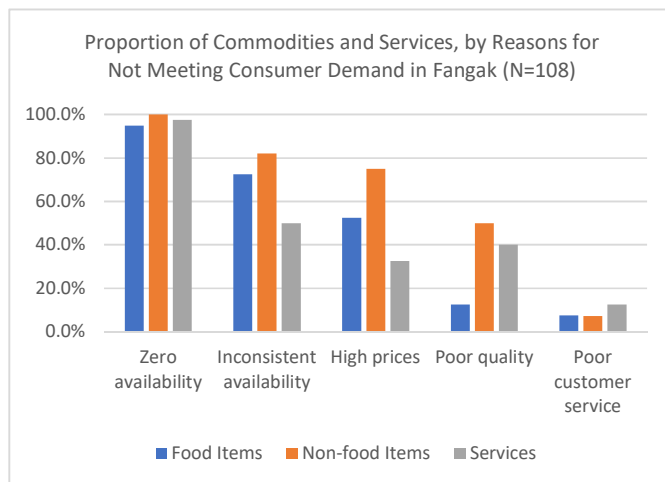
This section describes the types of food items, non-food items and services which consumers reported being dissatisfied with in each location. Respondents were asked to report their levels of satisfaction with 40 food items, 28 non-food items and 40 services being offered in the market. If they were dissatisfied, they were asked to choose the main reason behind their dissatisfaction, which could be due to zero availability of product/service, inconsistent availability, the product/service being too expensive, poor quality, poor customer service, low trust in the vendor or poor match of product/service. The analysis focuses on the first five factors of dissatisfaction as these are the most significant unmet demands and probable entry points for a TVET/VT/skills development programme. The most frequently reported barrier across the entire spectrum of items and services was high prices. Thus, conducting a detailed analysis within each categorization of dissatisfaction, especially those linked to availability and quality of product/service, is expected to help identify potential entry points for livelihood strategies and vocational training programmes.

The first section below details these entry points more broadly for food items, non-food items and services for each location, followed by the top two or three types of commodities/services found to have unmet demands in each location.

Figure 10: Proportion of Commodities and Services with Unmet Demands

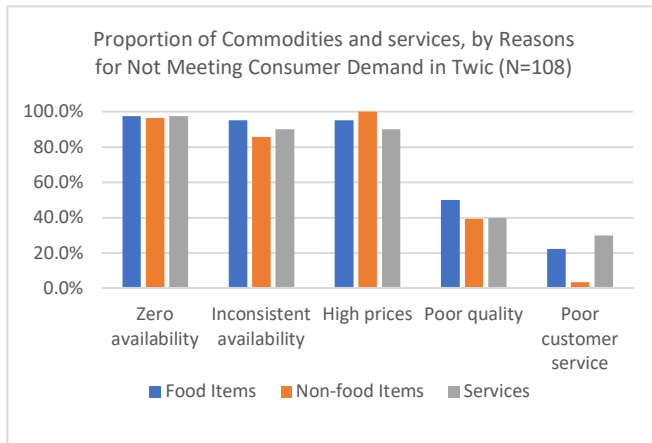


Juba consumers reported very high prices as the primary barrier for buying nearly all food and non-food items and for availing services. The key informant interviews (KIIs) with a business influencer and a community leader revealed that lack of hard currency and insecurity in the country are among the top factors that contribute to a rise in inflation. However, they felt that there is potential to use poor quality of produce and limited availability as entry points for provision of food items.

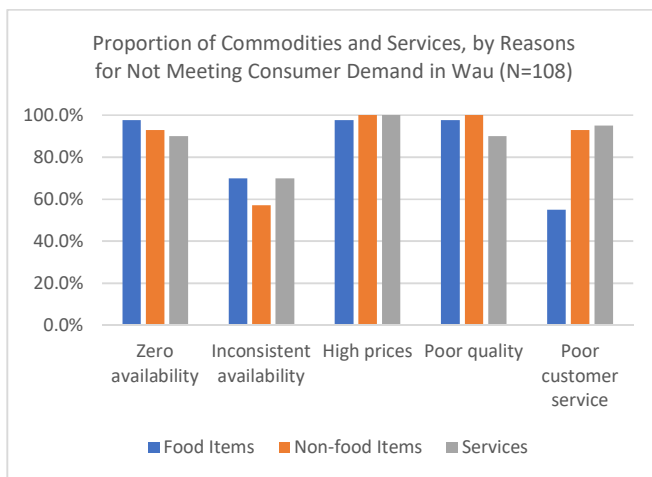


In Fangak, the biggest barrier to meeting consumers' demands was the complete absence of many products and services. During a KII, a government official pointed out that since 2013, the population in Fangak has been growing rapidly due to an influx of IDPs leading to a considerable increase in demand for products and services. A community leader explained that most vendors do not stock large quantities of food due to lack of security and lack of capital further exacerbating the situation. Thus,

there is opportunity to introduce several food items and services in the market, while being mindful about prices as high prices were observed to be a significant barrier for nearly 80% of all non-food items.

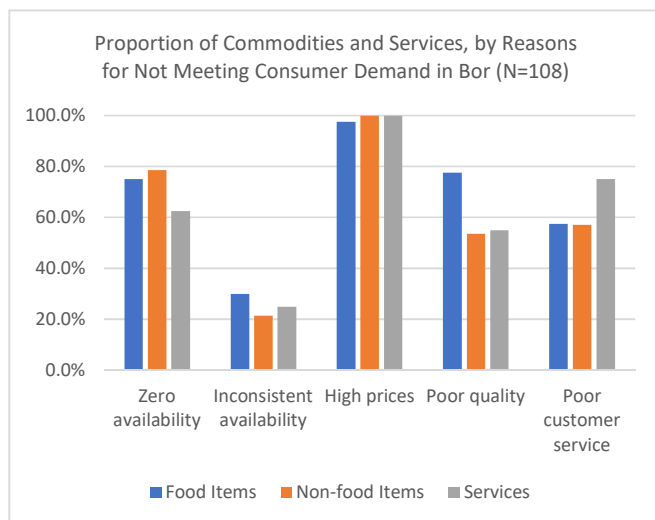


In Twic, there are significant magnitudes of unmet demands for nearly all food and non-food items as well as services. Again, absolute lack of availability is the overarching reason for dissatisfaction besides high prices.



In Wau, zero availability and poor quality were reported for nearly all of food, non-items and services, while poor customer service was also indicated as a problem for a high proportion of non-food items and services. The dissatisfaction of consumers in Wau market is also documented in another study by IOM, which reports that “for 15 out of 35 goods asked about, over 50% of the respondents indicated being dissatisfied with the availability in the local market,”<sup>105</sup> indicating some potential for growth.

<sup>105</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)



In Bor, the trend was a bit different as zero and inconsistent availability were not as frequently reported as in other locations. Poor customer service was reported for many service provisions and non-food items, while poor quality was a problem for food items. Secondary data for Bor corroborates the problem of high prices observed in Bor and attributes it to the high transport cost (due to scarcity of fuel), low local production and disruption of supplies due to conflict as the main drivers of local currency depreciation.<sup>106</sup>

The Bor Food Security and Nutrition

Assessment<sup>107</sup> carried out by FAO/WFP/NBS shows that the prices of grains, in particular increased substantially from 16% to 21% in 2017 due to high inflation.

### Satisfaction with Food Items

The tables below indicate which food, non-food items and services suffer from unmet demand for each location. For each type of dissatisfaction, the top one or two items/services have been indicated, depending on whether more than one item or service was reported by the same proportion of consumers.

The top food items reported by respondents to be completely absent in their markets were millet in Juba (24.1%, N=9) and Bor (38.9%, N=14), roots like cassava in Fangak (93.5%, N=34) and Twic (53.6%, N=19) and local whole fruits in Wau (33.3%, N=12).

Food items which were found to be inconsistently available by most of the respondents in each location were pulses in Juba (17.2%, N=6), fresh bread in Fangak (48.4%, N=17), rolex/packaged juice/sesame in Twic (each reported by 14.3%, N=5), sorghum in Wau (19.4%, N=7) and smoked fish in Bor (5.6%, N=2).

A large proportion of consumers found high prices to be barriers to buy imported whole fruit in Juba (75.9%, N=27), rice in Fangak (48.4%, N=17), animal fats and oils in Twic (39.3%, N=14), goat meat and rice in Wau (50% each, N=18) and sorghum in Wau (94.4%, N=34).

Consumers were also mostly dissatisfied with the quality of chicken meat and rolex in Juba (10.3% each, N=3), packaged juice in Fangak (16.1%, N=6) and Twic (10.7%, N=4), rolex/roasted chapati in in Wau (27.8%, N=10) and smoked fish in Bor (19.4%, N=7).

<sup>106</sup> FAO, WFP and NBS. (2017). *Bor Urban Food Security and Nutrition Assessment Report*.

<sup>107</sup> *Ibid*.

Poor customer service was reported most widely for fresh juice providers in Juba (13.8%, N=5), eggs/millet/nuts sellers in Fangak (3.2% each, N=1), cut fruit sellers in Twic (7.1%, N=2), fish sellers in Wau (8.3%, N=3) and nuts sellers in Bor (13.9%, N=5).

A more detailed list of items which constitute the top one or two items suffering from unmet demand is given below. Imported products are denoted by (I), local products are indicated by (L) while packaged products are shown by (pkd.).

Table 4: Reasons for Dissatisfaction with Various Food Items

	Dissatisfaction: Zero availability	Dissatisfaction: Inconsistent availability	Dissatisfaction: Too expensive	Dissatisfaction: Poor quality	Dissatisfaction: Poor customer service
<b>Juba</b>	Millet Local grains Nuts	Pulses Live poultry Eggs	Sugar Whole Fruit (I) Vegetables (L) Cakes	Meat (chicken) Rolex	Cut fruit Juice (fresh) Cakes
<b>Fangak</b>	Roots Cakes Whole fruit (I)	Bread (fresh) Rolex Whole fruit Vegetables-loc.	Rice Sugar	Milk (fresh) Meat (chicken) Whole Fruit (L) Juice (pkd.)	Eggs Millet Nuts
<b>Twic</b>	Roots Wheat Millet Cut fruit	Rolex Local grains Juice (pkd.) Sesame	Animal Fats Charcoal Flour Sugar	Prepared food Other Grains (L) Pulses, Salt Whole Fruit (L) Juice (pkd.) Sesame	Cut fruit
<b>Wau</b>	Whole fruit Fish (smoked) Bread (fresh)	Milk (fresh) Wheat Sorghum Butter Vegetables-loc.	Animal Fats Meat (goat) Rice Vegetables (I)	Milk (fresh) Fish (smoked) Bread (fresh) Rolex Other Grains Cakes	Bread (fresh) Cut fruit
<b>Bor</b>	Millet Fish (smoked) Animal fat/oils Yoghurt Vegetables (I)	Fish (dried) Local grains	Meat (goat) Flour Sorghum	Fish (smoked) Sugar Butter	Nuts

One study, conducted by the IOM in Wau, provides information regarding consumer satisfaction in Wau. It found that Wau consumers indicated the highest levels of satisfaction with nuts (76.2%, N=48) and local vegetables (76.2%, N=48). The highest levels of dissatisfaction were reported for imported fruits (82.5%, N=54), slaughtered poultry (79.4%, N=50) and imported grains (74.6%, N=47).<sup>108</sup>

<sup>108</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

### Dissatisfaction with Non-Food Items

The top non-food items which were reported by respondents to be completely absent in their markets were locally made clothes and footwear as well as straw products in Juba (17.9% each, N=6) and water irrigation systems in Fangak (90.3%, N=32), accessories, metals goods, solar panels and mobile phones in Twic (17.9% each, N=6), handicraft items in Wau (19.4%, N=7) and locally made clothes and footwear in Bor (22.2%, N=8)

Non-food items which were found to be inconsistently available by most of the respondents in each location were fishing equipment in Juba (6.9%, N=2), metal goods and locally produced agricultural tools in Fangak (58.1%, N=21), wood products in Twic (17.9%, N=6), locally made agricultural tools in Wau (13.9%, N=5) and handicrafts/straw products in Bor (5.6%, N=2).

A large proportion of consumers found high prices to be barriers to buying imported clothes and footwear in Juba (72.4%, N=26), leather products in Fangak (32.3%, N=12) and Wau (75%, N=27), imported agricultural tools in Twic (28.6%, N=10) and soap in Bor (91.7%, N=33).

Consumers were also most dissatisfied with the quality of footwear in Juba (13.8% each, N=5), locally made clothes and footwear in Fangak (16.1%, N=6), imported agricultural tools in Twic (10.7%, N=4), wood products in Wau (22.2%, N=8) and locally made agricultural tools in Bor (13.9%, N=5).

Poor customer service was reported most widely for sellers of soap, water irrigation systems, medicines and leather products in Juba (3.4% each, N=1), medicines in Fangak (3.2%, N=1) and Twic (3.6%, N=1), other agricultural tools in Wau (13.9%, N=5) and imported agricultural tools in Bor (8.3%, N=3).

Non-food items with unmet needs are summarised below for each location. Imported products are denoted by (I), local products are indicated by (L).

Table 5: Reasons for Dissatisfaction with Various Non-Food Items

	Dissatisfaction: Zero availability	Dissatisfaction: Inconsistent availability	Dissatisfaction: Too expensive	Dissatisfaction: Poor quality	Dissatisfaction: Poor customer service
<b>Juba</b>	Clothes (L) Straw products (L)	Clothes (L) Fishing equipment	Clothes (I) Wood products (I) Other Tools (I)	Footwear	N/A
<b>Fangak</b>	Solar panels/chargers Water irrigation systems Stationary items	Metal goods (L) Agricultural Tools (L)	Soap Clothes (I)	Clothes (L) Wood Products (L)	N/A
<b>Twic</b>	Accessories Metal goods (L) Solar panels/chargers	Wood products (L)	Soap Agricultural Tools (I)	Agricultural Tools (I)	N/A

	Dissatisfaction: Zero availability	Dissatisfaction: Inconsistent availability	Dissatisfaction: Too expensive	Dissatisfaction: Poor quality	Dissatisfaction: Poor customer service
	Mobile phones/parts				
<b>Wau</b>	Handicrafts Agricultural Tools (L)	Other Tools (locally made)	Clothes (I) Leather products	Clothes (I) Wood Products (L)	Other Tools (I) Mobile phones/parts
<b>Bor</b>	Handicrafts Clothes (L) Water irrigation systems	Handicrafts Straw products (L) Other Tools (I)	Soap Footwear	Agricultural Tools (L) Other Tools (L)	Agricultural Tools (I)

As per the IOM study in Wau, respondents were least likely to report being consumers of toiletries (47.6%, N=30), and spare parts (44.4%, N=28). The highest levels of dissatisfaction were reported for imported clothes (76.2% N=48).<sup>109</sup>

#### Dissatisfaction with Services

The services which were reported missing in their local market by respondents were: tailoring in Juba (20.7%, N=7), private training centres in Fangak (100%, N=36), construction services (non-tukol) in Twic (71.4%, N=) and Bor (13.9%, N=5) and private loans services in Wau (47.2%, N=17).

Services which were found to be low in availability by most of the respondents in each location were generator repair technicians in Juba (13.8%, N=5), private loans, animal medical care and fast food locations in Fangak (19.4% each, N=7), appliance repair and photographers in Twic (14.3%, N=5), private loan providers in Wau (11.1%, N=4) and rock and gravel splitting in Bor (22.2%, N=8).

A large proportion of consumers found high prices to be barriers to accessing services from boda bodas in Juba (72.4%, N=26) and Wau (61.1%, N=22), blacksmiths in Fangak (25.8%, N=9), butchers in Twic (25%, N=9) and mobile charging shops in Bor (91.7%, N=33).

Consumers were also most dissatisfied with the quality of fast-food snacks in Juba (13.8%, N=5), restaurant services in Fangak (29%, N=10), cut-fruit/blacksmith/restaurants/hairdressing/tailoring in Twic (7.1% each, N=2), small electronics repair/snacks/blacksmith services in Wau (19.4% each, N=7) and cut fruit/vegetable sellers in Bor (13.9%, N=5).

Poor customer service was reported most widely for providers of water delivery services (17.2%, N=6), shoe repair/electrician services in Fangak (6.5% each, N=2), bricklayer services in Twic (7.1%, N=2), tailoring in Wau (27.8%, N=10) and dobbins/plumbing/water delivery/butcher/medical care in Bor (8.3%, N=3).

A summary table of dissatisfaction with services, with reasons, in each location is given in Table 6.

<sup>109</sup> *Ibid.*



Table 6: Reasons for Dissatisfaction with Various Services

	Dissatisfaction: Zero availability	Dissatisfaction: Inconsistent availability	Dissatisfaction: Too expensive	Dissatisfaction: Poor quality	Dissatisfaction: Poor customer service
<b>Juba</b>	Tailor services Private loan services	Generator repair Technician services Water delivery	Boda bodas Restaurant/Bar services Construction services - General	Snack/Fast foods	Water delivery
<b>Fangak</b>	Photo/Videograph er services Printing and design services Private training centres	Snack/Fast foods Private loan services Medical care for animals	Blacksmith Mobile charging shop	Small electronics repair Restaurant/Ba r services	N/A
<b>Twic</b>	Microbuses/ Matatus/Hiace Construction services - General	Appliance repair Photo/Videogr apher services	Butcher services		N/A
<b>Wau</b>	Electrician services Private loan services	Private loan services	Boda bodas Vehicle Mechanic Barber/Salon services	Small electronics repair Snack/Fast foods Blacksmith	Cobble/Shoe repair Tailor services Butcher services
<b>Bor</b>	Construction services - General	Split rocks or gravel	Mobile charging shop Medical care (for humans)	Cut fruit or vegetables	N/A

As per the IOM study in Wau, 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 in which there are good opportunities for new entrepreneurs.<sup>110</sup>

In the secondary locations, the findings of a CARE study conducted in 2017 show that just a year ago respondents in Twic East were more likely to be satisfied with a given good or service compared to those in Duk or Pibor<sup>111</sup> suggesting large differences between cities.

<sup>110</sup> *Ibid.*

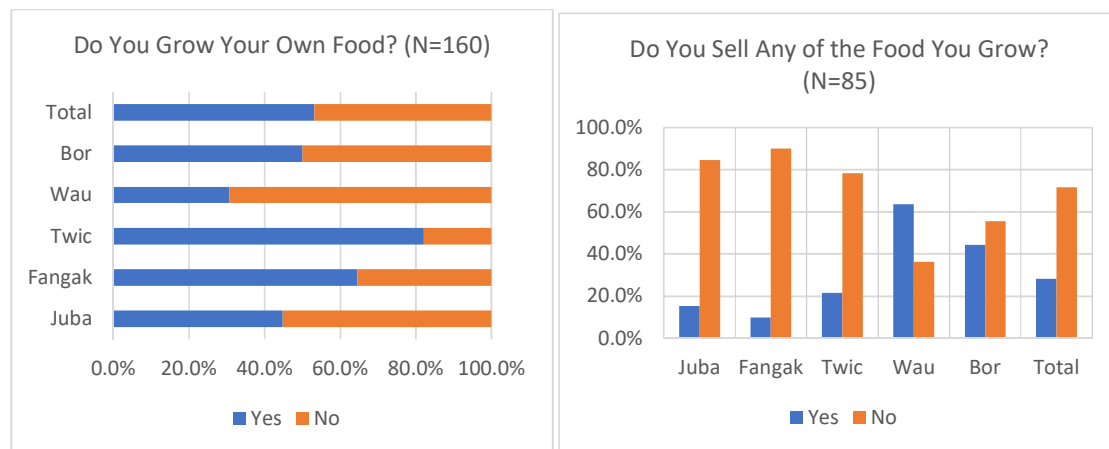
<sup>111</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

#### 2.1.4. Domestic Food Production Trends

Slightly over half (53.1%, N=85) of the total respondents reported growing their own food. This percentage was the highest in Twic with more than 80% (N=23) consumers engaging in domestic production of food, and it was the lowest in Wau with 30.6% (N=11) consumers growing food. Of the respondents who confirmed growing their own food in Juba, Fangak and Twic, almost 80% or more did not sell any food they grow indicating the high prevalence of domestic consumption of own-grown food. However, in Wau, this trend was reversed. There was a higher share of respondents (63.6%, N=7) that reported selling their domestically produced food.

In Bor, exactly half of the sample did grow their own food, although 55.6% (N=10) of such home food producers did not sell their products. This trend in the general population in Bor may differ because a secondary data source, namely the Bor Food Security Analysis report by FAO/WFP/NBS found a much lower incidence of home food production – only 10% of the 625 surveyed households were observed to be cultivating food. The same report also found that home production provides enough cereals for 1.8 to 2 months for the household.<sup>112</sup>

Figure 11: Home Food Production Trends



Secondary data indicates that most local markets, which depend on feeder markets, are heavily dependent on imports and no substitution sources are available locally. Most produce being imported leads to consumers being dissatisfied with high prices and insufficient quantity. Thus, practices associated with row planting and irrigation techniques are necessary as food security is threatened in particular during the rainy season.<sup>113</sup> In Kwajok there are very few fish stalls<sup>114</sup> despite ready access to a river. In addition, there is a low consumption of eggs and poultry products as poor packaging materials for eggs means they are traded in low volumes on the markets.<sup>115</sup>

<sup>112</sup> FAO, WFP and NBS. (2017). *Bor Urban Food Security and Nutrition Assessment Report*.

<sup>113</sup> UNESCO. (2018). *Rapid Assessment of the Technical and Vocational Education and Training (TVET) Sector in South Sudan*.

<sup>114</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

<sup>115</sup> *Ibid.*

### 2.1.5. Seed Value Chain

In Juba, the most common seed types used by 40% or more of respondents were maize, okra, groundnut and sorghum. A majority (70%, N=14) of the seed-buying consumers in Juba bought their seeds from the same boma, but a different market, and 20% (N=4) were buying from the same payam but different boma. Less than half (45%, N=9) of the consumers received their seeds from agro-input businesses while 35% (N=7) received the seeds from NGOs, relatives or used saved seeds. When asked about their experience as a customer of seeds for planting, 48.3% (N=14) of the customers were satisfied with the seeds on offer.

In Fangak, the most common seed types were okra and maize. A little over half of those who bought seeds in Fangak bought from the same boma but a different market. Seeds from the same payam but different boma and from the same county but different payam each contributed over 20% (N=5, N=4 respectively) of the seed purchased. In Fangak, all the respondents (N=19) reported obtaining their seeds from NGOs, while over half of them also reported relatives as a source of seeds. It is important to note that Fangak is the only location that reported having no agro-input businesses. Only a very small proportion of consumers were satisfied with their seeds, while slightly less than half (48.4%, N=15) were dissatisfied due to inconsistent availability, and 35.5% (N=11) were not even able to buy the seeds even though they needed them due to unavailability.

In Twic, okra, sorghum and maize were the most common seed types obtained. Here, a little over half of the consumers procured their seeds from the same state but a different county. Smaller percentages of customers got their seeds from either the same county, but a different payam or even a different state within South Sudan. In Twic, NGOs were seed providers for 42.1% (N=8) of the customers. This was followed by seed fairs and relatives each providing seeds to 21.0% (N=4) customers. 32.1% (N=9) of customers were satisfied with their product. However, discontent with inconsistent availability and poor quality was voiced by a few customers.

In Wau, okra and groundnuts were common seed types. Half (50%, N=9) of the consumers collected their seeds from the same boma, different markets and a little over 20% (N=4) came from same county, different payam. In Wau, 83.3% (N=15) of consumers procured their seeds from NGOs and the remaining minority received seeds from relatives. The dissatisfaction felt by customers in Wau stemmed from high prices of seeds, unavailability, poor quality and poor customer service.

In Bor, the most common seed types were maize, okra, groundnut, beans, sorghum and pumpkin. More than 80% (N=26) of consumers bought these from within the same county, different payam, and the remaining came from same state, different county. In Bor, 81% (N=26) of customers reported using saved seeds while 62.5% (N=20) secure them from relatives. However, a smaller share also collected their seeds from agro-input businesses and NGOs. In Bor, the dissatisfaction of 72% (N=11) of customers came from the seeds being too expensive.

The following table is a summary of responses regarding customers' satisfaction with seeds in the local market across all locations.

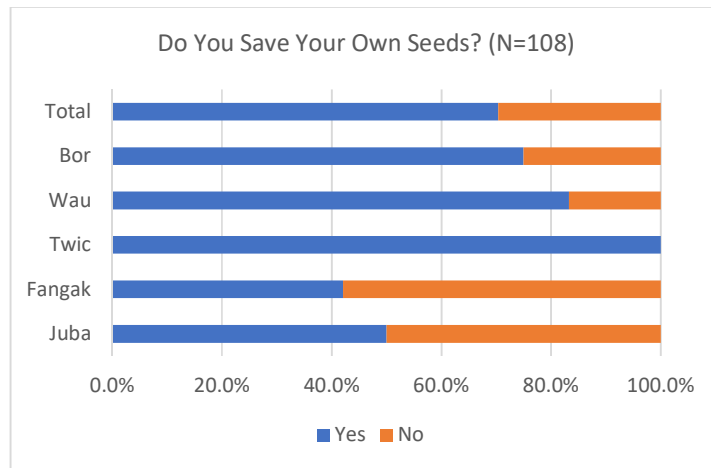
Table 7: Satisfaction with Seeds Available in the Market

	Juba (N=29)	Fangak (N=31)	Twic (N=28)	Wau (N=36)	Bor (N=36)	Total (N=160)
<b>Satisfaction with seeds for planting</b>						
Satisfied	48.3%	12.9%	32.1%	11.1%	13.9%	22.5%
Never needed this product	24.1%	3.2%	25.0%	30.6%	5.6%	17.5%
Needed this, but it has never been available	3.4%	35.5%	7.1%	13.9%	5.6%	13.1%
Dissatisfied: Inconsistent availability	0.0%	48.4%	10.7%	0.0%	0.0%	11.3%
Dissatisfied: Too expensive	10.3%	0.0%	3.6%	22.2%	72.2%	23.8%
Dissatisfied: Poor quality	10.3%	0.0%	7.1%	8.3%	0.0%	5.0%
Dissatisfied: Poor customer service	0.0%	0.0%	3.6%	8.3%	2.8%	3.1%
Dissatisfied: Not good match	0.0%	0.0%	7.1%	0.0%	0.0%	1.3%
Dissatisfied: Do not trust vendor	0.0%	0.0%	3.6%	0.0%	0.0%	0.6%
Don't know	0.0%	0.0%	0.0%	5.6%	0.0%	1.3%
Refuse to answer	3.4%	0.0%	0.0%	0.0%	0.0%	0.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Saved Seeds vs. Bought Seeds

The study also attempted to understand the prevalence of consumers who save seeds and explore the differences perceived between seeds that are purchased from agro-input businesses, relatives, NGOs and seeds that consumers save on their own.

Figure 12: Proportion of Consumers Saving Seeds



In Juba and Fangak, close to half the respondents said that they save seeds on their own. In Twic, Wau and Bor, the number was substantially higher.

## Knowledge of Seed Production

Table 8: Seed Production Knowledge of Respondents

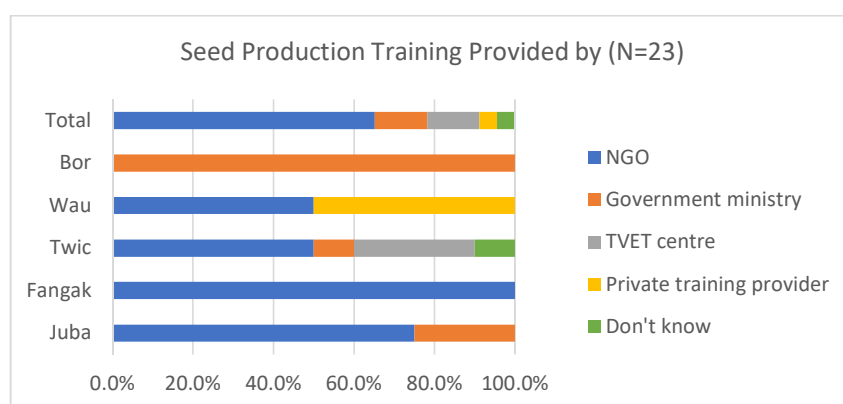
Seed production knowledge areas	Juba (N=15)	Fangak (N=13)	Twic (N=16)	Wau (N=8)	Bor (N=18)	Total (N=80)
Use of foundation seeds	46.7%	46.2%	75.0%	50.0%	11.1%	44.3%
Isolation distance between seeds	40.0%	23.1%	37.5%	12.5%	5.6%	24.3%
Knowledge of land history	40.0%	38.5%	37.5%	25.0%	72.2%	45.7%
Planting technique	60.0%	69.2%	25.0%	25.0%	61.1%	50.0%
Modern planting tools	13.3%	38.5%	31.3%	50.0%	38.9%	32.9%
Removing of diseased/damaged plants	33.3%	23.1%	37.5%	0.0%	72.2%	38.6%
Adequate moisture	13.3%	30.8%	25.0%	25.0%	22.2%	22.9%
Adequate storage	33.3%	23.1%	6.3%	12.5%	11.1%	17.1%

In total, 64.8% (N=70) of the respondents had some knowledge of seed production. However, in Wau and Bor, this number was lower.

Of the respondents that had some knowledge of seed production, knowledge in areas of adequate moisture and storage, modern planting tools and removing disease infested damage (except Bor) was found to be inadequate in all locations. Furthermore, Bor respondents disclosed that they have no knowledge on the use of foundation seeds and isolation distance between seeds. This finding is consistent with KIIs in Bor during which agriculturist informants voiced the lack of knowledge about modern agricultural techniques as well as isolation distance between crops as skills needed to help cultivators improve quality of their produce. Wau respondents tended to lack information on isolation distance, knowledge of land history and planting techniques.

A majority (67.1%, N=47) of the respondents in total had not received any training on seed production. Of the 23 respondents that had received training, 65.2% (N=15) received it from NGOs. In Fangak, all (N=6) of the respondents had received training from NGOs, and in Bor, the only respondent with previous training had received the training from government ministries. In Wau, training was reported to have been given by both an NGO and a private training provider. An overwhelming majority (95%, N=22) of the respondents confirmed applying the knowledge they learned during training for their seed production, demonstrating that trainings might have a high potential to translate to actual application. To make up for the lack of formal training, in Juba and Fangak, community agriculture groups reportedly undertook training in community farming and also learned to be self-reliant. An experienced cultivator key informant talked about how he divided his farm into two parts, one where he trained workers in modern techniques and the other where they carried out farming with ordinary techniques as part of their training.

Figure 13: Providers of Seed Production Trainings



### 2.1.6. Purchasing Habits and their Drivers

Among the most frequently purchased items, charcoal was in the top three in all locations. Additionally, in Juba, flour and vegetables formed the top three. In Fangak, animal fat and cooking oil were the first followed by meat (chicken). Sugar was the top most purchased item in Twic and Wau. The others in the top three were meat (goat) in Twic and an equal share of okra and salt in Wau. In Bor, sorghum and animal fat and cooking oil also comprised the top three most purchased items.<sup>116</sup>

Approximately one in four (25.7%, N=18) of the consumers stated that they would like to have more grains such as rice, wheat and sorghum sold in the market. A handful of consumers in Juba, Twic and Wau also desired more vegetables. In Fangak, there was demand for dairy products (22.2%, N=5). In Bor, 33.3% (N=4) customers demanded more agricultural tools to be available in the market.

When asked about the factors that influence their choice of vendor, a large majority of all customers (66.2%, N=106) in all locations stated price as the most important factor, followed by quality of the product (15.6%, N=25), cleanliness of the product (5.6%, N=9), knowledge of the owner (4.5%, N=7) and friendliness of the staff (2.5%, N=4).

<sup>116</sup> Households on average were spending about 78% of their monthly expenditure on food. See FAO, WFP and NBS. (2017). *Bor Urban Food Security and Nutrition Assessment Report*.

Table 9: Factors which Influence Consumers' Selection of Vendors

Driving factors	Juba (N=29)	Fangak (N=31)	Twic (N=28)	Wau (N=36)	Bor (N=36)	Total (N=160)
Price	58.6%	54.8%	89.3%	72.2%	58.3%	66.3%
Friendliness of staff	3.4%	3.2%	7.1%	8.3%	0.0%	4.4%
Quality of product	20.7%	16.1%	3.6%	8.3%	27.8%	15.6%
Cleanliness of store	3.4%	3.2%	0.0%	2.8%	2.8%	2.5%
Cleanliness of product	10.3%	9.7%	0.0%	2.8%	5.6%	5.6%
Knowledge of owner	0.0%	9.7%	0.0%	5.6%	5.6%	4.4%
Nationality of owner	0.0%	3.2%	0.0%	0.0%	0.0%	0.6%
Other (specify)	3.4%	0.0%	0.0%	0.0%	0.0%	0.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

In the secondary locations as well, prices were also observed to be of utmost importance, as the prices of agricultural produce are reported to decrease by 50% up to 70% during the dry season.<sup>117</sup> Competition between markets may also influence prices. For example, Kwajok market is considered to be in competition with Wau market as they are two large markets less than 100km away from each other.<sup>118</sup> In Kwajok the customers are mainly women and show large disparities in terms of purchasing power.<sup>119</sup> In Pibor and Twic East, more respondents reported that agricultural products are their main source of income, followed by livestock sales in Pibor and no source of income at all in Twic East. In contrast, in Duk County, this is inverted as more respondents reported livestock sales are their primary source of income for their household, followed by agricultural products.<sup>120</sup>

<sup>117</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

<sup>118</sup> *Ibid.*

<sup>119</sup> *Ibid.*

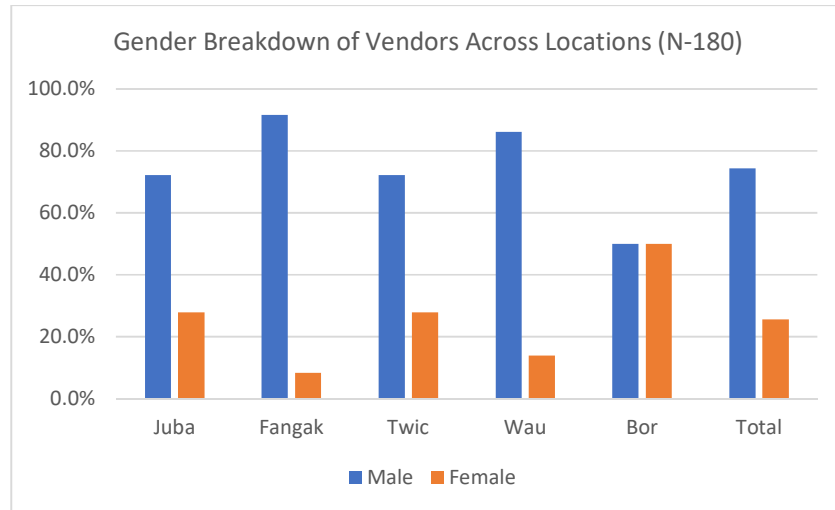
<sup>120</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

## 2.2. Business' Perspective

The study captured the experience of businesses in the local market through a separate survey aimed at collecting insights from business owners and vendors present in the market. Findings include vendor demographics, their ability to do business and expand, recruitment experience, skills gaps and perception held by businesses about the support needed by youth to be job or business ready.

### 2.2.1 Vendor Demographics, Income and Savings

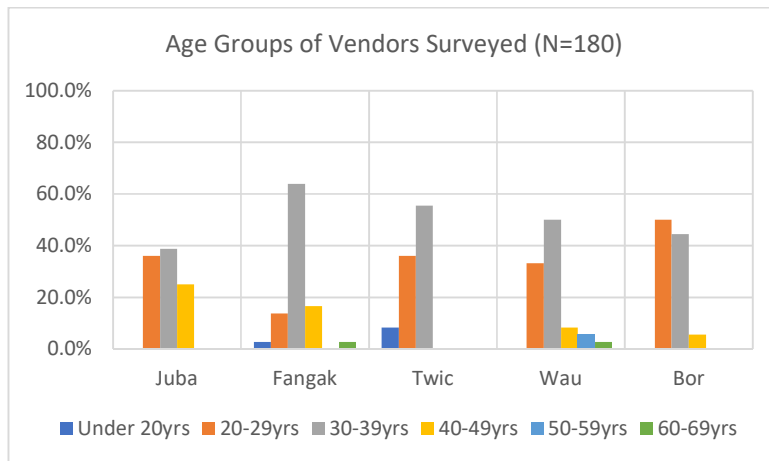
Figure 14: Gender Breakdown of Vendors



The vendor sample of this study was principally made up of men while a few female vendors were present in Juba, Twic, Wau and Bor. Most vendors across all locations were South Sudanese nationals. However, there were some non-Sudanese present (18.3%, N=33), mainly in Juba and Wau, and a few in the remaining locations. The age distribution varies slightly from one location to the next. However, the majority (more than 90%) of vendors were in the age group of 20 to 49 years. The household size was mostly the same (5-9 persons) for vendors across locations, and the overall education level was found to be low everywhere except in Juba.



Figure 15: Age Distribution of Vendors



In Juba, a quarter of the sample was female (N=9), and a little over a third of the sample were foreign nationals mainly from Sudan and Uganda and some from Ethiopia, Kenya, Somalia and Burundi. A sizable proportion of the vendors (29.6%, N=8) came from small size households comprising of one to four persons. In Juba, 30.6% (N=11) of the vendors have completed secondary school, and 19.4% (N=7) have completed university.

In Fangak, the presence of female vendors was the lowest in all locations (8.3%, N=3). However, the vendor household size was relatively larger with 29.4% (N=10) and 32.4% (N=11) of vendors having five to nine and 10-15 persons in their household, respectively. Furthermore, of all the five locations surveyed, Fangak had the highest share of vendors (26.5%, N=9) with a very large household size of 16-20 persons. Over 50% (N=18) of their vendor population had either no education or only some primary school education. There were some foreign vendors from Ethiopia and Sudan present.

In Twic, 27.8% (N=9) were female vendors, and close to half the share of vendors (48.6%, N=17) had a household size of five to nine persons followed by 34.3% (N=12) with 10-15 persons. A sizable proportion of 38.9% (N=14) of the vendors were IDPs. Similar to Fangak, more than half of the vendors in Twic had no or some primary school education.

In Wau, this trend is reversed. Of the vendors surveyed, 19.4% (N=7) have some secondary education, and 16.7% (N=6) have completed secondary school and university. Wau is also the only location with 5.6% (N=2) vendors having participated in postgraduate education. A majority had a household with five to nine persons. Most vendors in Wau were men (86.1%, N=30). However, a GIZ study found that “female merchants represent around half of the workforce. They mainly sell locally-produced vegetables and offer catering services (e.g. selling tea or cooked food). IDP merchants were not reported to be active on the market.”<sup>121</sup> There were also foreign vendors mostly from Sudan and a handful from Eritrea, Somalia and Uganda, a finding reiterated by GIZ, who found that “there are a significant number of economic migrants from Sudan and East Africa who trade goods and work in the service sector in

<sup>121</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

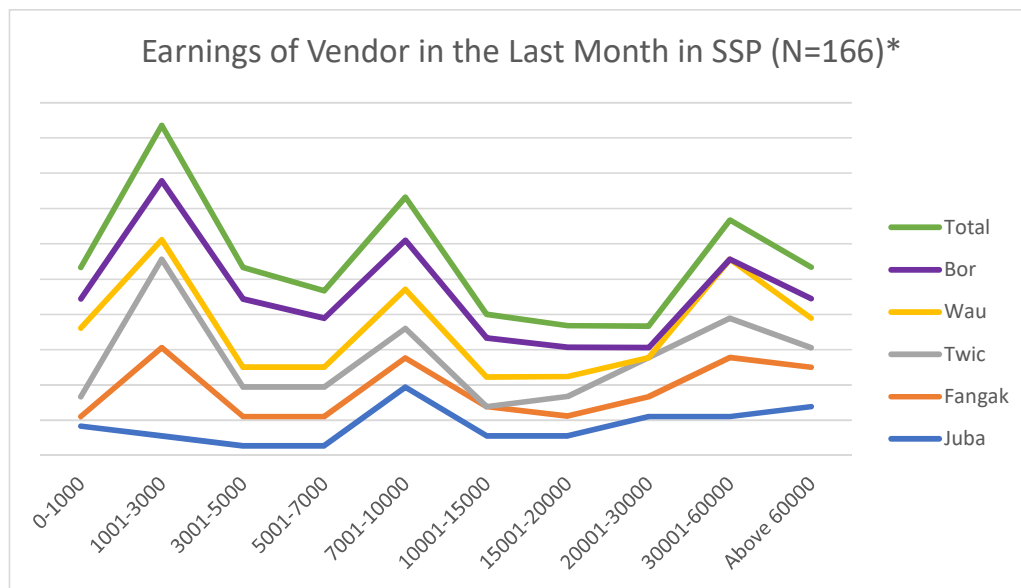
Wau.”<sup>122</sup> This is significant as foreign merchants typically have better access to finance than local merchants. This results in different levels of inclusion and influence on the markets between the two groups.<sup>123</sup>

In Bor, the age and gender trends were different. Half of the vendors were quite young in the age group of 20-29 years. Half of the vendor sample from Bor was comprised of women. Education levels were low as well with slightly over half of all vendors having no or some primary education. Over half of the vendors from Bor had a household size of five to nine persons. A few vendors (N=3) were from Uganda and the rest were South Sudanese nationals.

Data indicates that the number of persons supported by a vendor is often more than the number of people present in his/her household. Thus, those with a small household size of one to four persons reported most often support more people outside their household while those with a big household size of 10 to 15 persons were more likely to support fewer people in their household, quite possibly because there were multiple breadwinners in their household.

Vendor Income and Savings

Figure 16: Vendor Earnings in the Last Month<sup>124</sup>



\*12 respondents answered, “Don’t know” and 2 chose not to answer this question

The graph above shows the earnings from the previous month as reported by the vendors surveyed. The key takeaway from this graph is that the income distribution of vendors (N=166) is similar in all locations except in Juba. The green line shows the overall trend in earnings in the last month with three peaks at 1001-3000 SSP, 7001-10000 SSP and 30001-60000 SSP. In Juba, however, the trend peaks once,

<sup>122</sup> *Ibid.*

<sup>123</sup> *Ibid.*

<sup>124</sup> This is stacked line chart which aims to demonstrate income trends rather than income distribution. In stacked line charts, each trend line treats the previous trend line as its base line instead of using the horizontal axis to plot a data finding.

with 19.4% of the vendors having earned 70001-10000 SSP in the last month, and it has relatively long and flat tails on both sides of the peak.

40% (N=14) of the vendors believe that they do not earn enough to meet the basic needs of their household. Less than 10% (N=3) of the vendors in Juba think that they earn enough to meet the basic needs of their household and save some money. Despite this low percentage, 58.3% (N=21) of the vendors declare saving some income every month. Bank savings were the preferred means of saving for 85.7% (N=18) of the vendors in Juba who have saved part of their income.

In Fangak, this trend is reversed. Of the surveyed vendors, 44.4% (N=16) reported that they believe they earn enough to meet the food and shelter needs of their household. In addition to satisfying basic needs, almost 20% (N=7) of the vendors reported that they can provide for medical treatment and school fees, and another 20% (N=7) stated that they can even save some money. In Fangak also, 50% (N=18) saved some income every month. However, unlike Juba, 94.4% (N=17) of the vendors keep their savings money at home.

In Twic, almost all the vendors reported that they think they earn enough to meet their basic needs. Additionally, approximately half of the share of vendors (47.2%, N=15) thought that they earn enough to meet basic needs as well as medical and school expenses. Twic had the highest share of vendors (86.1%, N=31) who declared saving money every month. Their preferred method of saving was also at home (61.3%, N=19).

In Wau, however, an almost equal share of vendors believe that they can (30.6%, N=11) or cannot (33%, N=12) meet the basic needs of their household. Similarly, an exactly equal share of vendors (16.7%, N=6) vendors believed that they can provide for medical and school expenses and also save money from their income. Of the surveyed vendors, 61.1% (N=22) reported that they save money every month, and their preferred method of savings is in the bank (59.1%, N=13).

In Bor, one in six vendors reported that they think they earn enough to provide for all expenses and save money. However, one third of the remaining vendors believe that they do not earn enough for their household. A majority (69.4%, N=25) of the vendors save money every month, with 64% (N=16) saving money in the bank. Bor also had the highest share (16%, N=4) of vendors saving through informal savings groups.

#### 2.2.2. Profile of Vendors and Their Products/Services

In all locations except Wau, the proportion of sellers of items or goods was larger than the proportion of service providers. Despite this, consumption goods as well as sugar, cooking oils and maize were reportedly low in supply but high in demand according to an urban community leader.

More than 25% (N=45) of all vendors in all locations were engaged in selling consumer goods or had a general store. Additionally, in Fangak, 34.4% (N=12) vendors were selling imported clothes and footwear, and 21.9% (N=8) were selling soap and washing powder. Fangak vendors also specialise in purchasing in wholesale (75%, N=27) and mobile charging services (25%, N=9).

In Juba, other commonly sold products (10% or more vendors) were charcoal, clothes, footwear, fruits, vegetables, spare parts for vehicles and staples like grains, sugar and salt. Transport and logistics were the main service provided by 37.5% (N=13) vendors. However, it is important to note that transport services are seasonal in nature due to unfavourable weather conditions according to a community leader.

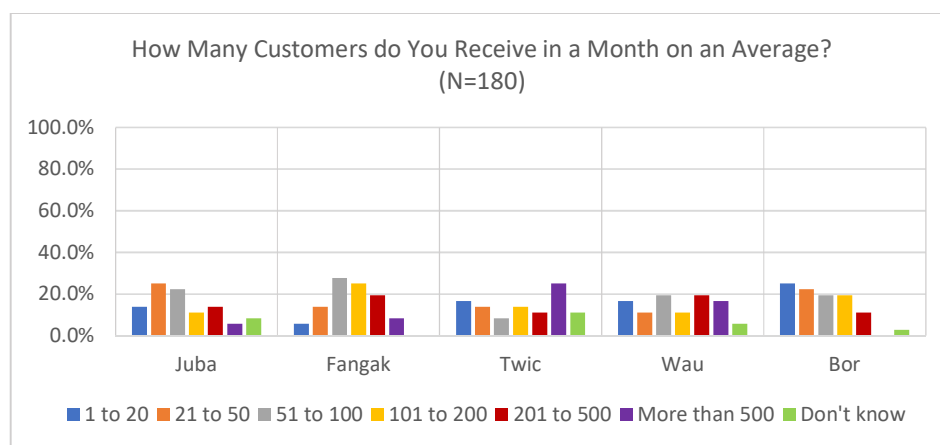
In Twic, clothes, footwear and staples are commonly sold items along with pharmaceuticals (13%, N=5). In terms of services, clothes washing, wholesale and tea shop services were each provided by 15.4% (N=6) of vendors.

In Wau, animal fat, cooking oils, soap, washing powder and plastic products are commonly sold products by vendors. The most commonly provided services (10% or more) are appliance repair, tea shops, trainings and transport and logistics. While only 10% (N=4) of vendors provide repairing services, these electrical repair services were high in demand but low in supply. The main reason for this is lack of adequate training for these services as mentioned by a government key informant.

In Bor, charcoal, dried/smoked fish, fruits, vegetables and milk products are sold by vendors. Tailoring is the most commonly provided service in Bor (17.6%, N=6) followed by mobile charging and running of tea shops (11.8% each, N=4). The Bor Food Security Analysis by FAO/WFP/NBS, while exploring linkages of food insecurity, also found a high incidence of households depending on selling of charcoal and petty trading while also tending to agriculture and livestock management.<sup>125</sup> The full range of products and services sold in each market is provided in Annex 11.

### 2.2.3. Customer Footfall and Profile

Figure 17: Average Monthly Customer Footfall

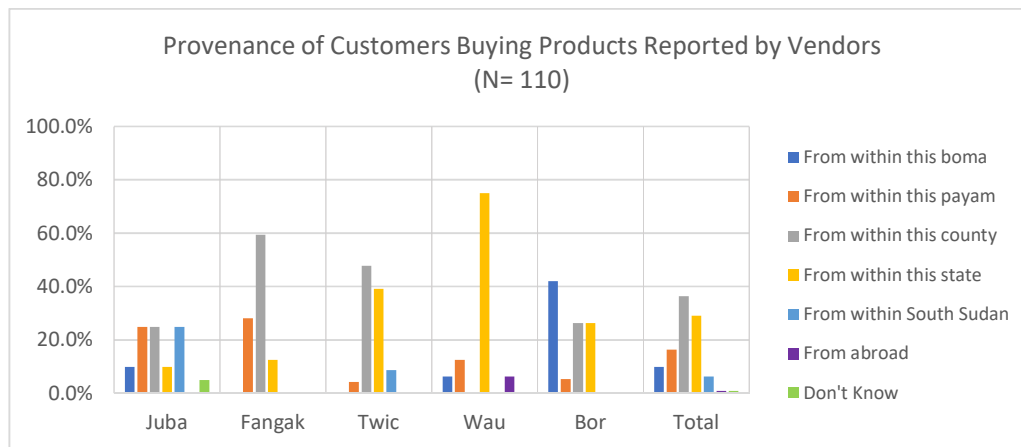


In Juba, the average number of customers a vendor reports receiving every month is relatively low. One in four vendors receive between 21 and 50 customers while one in five vendors receive between 51 and 100 customers. A large majority of the customers buying products are women (65%, N=71), and a large majority of customers using services were men (81.3%, N=16). This might indicate that women may

<sup>125</sup> FAO, WFP and NBS. (2017). *Bor Urban Food Security and Nutrition Assessment Report*.

exert more influence on decisions surrounding expenditures and choice of products to be bought for the household compared to men. The customers buying products came from within the same payam, county and within South Sudan (over 20% for each provenance). In Juba, 31.3% (N=5) of the customers using services come from within South Sudan and 25% (N=4) come from within the same boma.

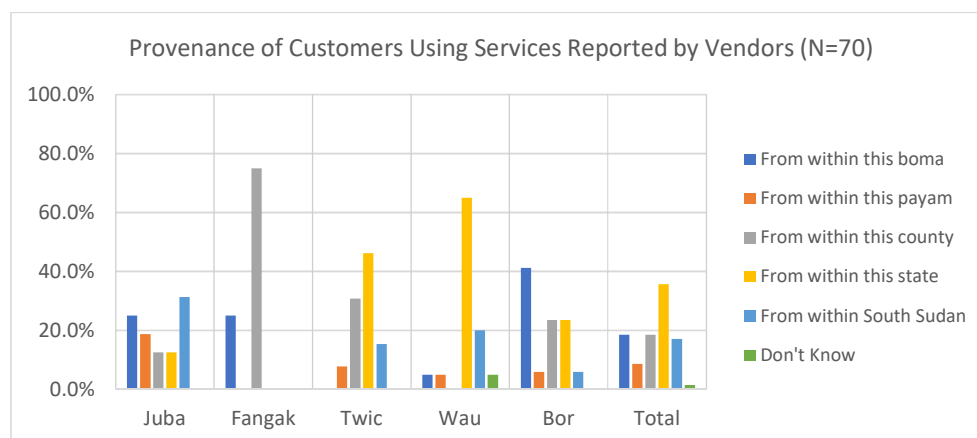
Figure 18: Provenance of Customers Buying Products



Fangak had a higher monthly average of customers per vendor. A significant proportion (27.8%, N=10) of vendors receive 51 to 100 customers and 25% (N=25) receive 101 to 200 customers. A substantial percentage of vendors also receive 201 to 500 customers on average every month. However, women are the largest buyers of both products and services unlike in Juba. In Fangak, 60% (N=19) of the product-buying customers and 75% (N=3) of the service-using customers come from within the same county.

Twic is the only location where 25% (N=9) of the vendors reported that they receive more than 500 customers on average in a month. Like Juba, women are the main product-buying customers and men were the main service-using customers in Twic. Approximately half (47.8%, N=10) of the product buying customers come from within the same county, and 46.2% (N=6) of the service-using customers come from within the same state.

Figure 19: Provenance of Service-Using Customers



In Wau, almost 20% (N=7) of the vendors have either 51 to 100 customers or 201 to 500 customers on average in a month. Men are the main customers of both products and services in Wau. More than 60% of Wau’s customers come from within the state.

In Bor, slightly more than 20% (N=8) of vendors each receive 1 to 20 or 21 to 50 customers. However, almost 20% (N=7) of vendors each welcome 51 to 100 or 101 to 200 customers on average in a month. Like Juba, women are the main product-buying customers and men are the main service-availing customers. More than 40% of Bor’s customers come from within the same boma.

More commodity sellers reported a lower number of average monthly customers. However, for each level of average monthly customers after 100 customers, more service providers report a higher number of customers than product sellers.

#### 2.2.4. Supply Chain of Products

Almost 90% (N=162) of vendors reported that they offer their products or services directly to the customers. A much smaller percentage of vendors also offer their products and services to other retailers in Juba, Fangak, Bor, and traders in Twic and Wau. Trends regarding from where the vendors procure their inputs or materials varied across locations.

Table 10: Where do Vendors Procure Their Inputs from

Inputs procured from	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Juba - Producer	22.2%	41.7%	22.2%	36.1%	19.4%	28.3%
Juba - Retailer/Wholesaler	38.9%	19.4%	13.9%	13.9%	27.8%	22.8%
Juba - Trader	13.9%	25.0%	13.9%	8.3%	25.0%	17.2%
Other market in South Sudan	16.7%	11.1%	16.7%	27.8%	33.3%	21.1%
Khartoum	0.0%	75.0%	13.9%	13.9%	0.0%	20.6%
Uganda	36.1%	5.6%	11.1%	13.9%	13.9%	16.1%
Kenya	22.2%	0.0%	5.6%	8.3%	0.0%	7.2%
East Africa	8.3%	0.0%	0.0%	5.6%	5.6%	3.9%
Other	5.6%	8.3%	25.0%	19.4%	8.3%	13.3%
I grow the agricultural products myself on my own land	0.0%	0.0%	2.8%	0.0%	2.8%	1.1%
Refuse to Answer	0.0%	0.0%	0.0%	0.0%	2.8%	0.6%

The vendors in Juba procure their stock from Juba retailers or wholesalers (38.9%, N=14), Uganda (36.1%, N=13), Juba producers (22.2%, N=8) and Kenya (22.2%, N=8). Most of these vendors procure stock or raw materials every week or every few weeks.

The vendors in Fangak procure their input from Khartoum (75%, N=27), Juba producers (41.7%, N=15) and Juba traders (25%, N=9). Most of these vendors procure their stock either every few months or every few weeks.

For Twic vendors, the most popular source of input was Juba producers (22.2%, N=8) or other markets in South Sudan (16.7%, N=6). A total of 34.3% (N=12) of these vendors purchase stock or raw materials every day and slightly over a quarter of them do so every month. A rapid market assessment done by World Vision in January 2014 also mapped the entire market, which is available in their report.<sup>126</sup>

In Wau, as in Twic, the goods and inputs are reportedly procured from Juba producers (36.1%, N=13) or other feeder markets in South Sudan (27.8%, n=10). Over a third (36.1%, N=13) of these vendors purchase stock or raw materials every day and slightly less than a quarter of them do so every few months. According to a rapid market assessment report by the NRC, “Major factors affecting traders in Wau include but [are] not limited to currency exchange rate, informal road taxes, trader taxes, high transport cost, insecurity and the rainy season which affects road accessibility.”<sup>127</sup>

In Bor, a third of the vendors reported that they obtain their inputs from other markets in South Sudan, while 27.8% (N=10) procure their inputs from Juba-based retailers and another quarter procure them from Juba traders (25%, N=9). The high reliance of Bor traders on markets based in Juba town for most food and non-food commodities was supported by secondary data namely the Bor Food Security Analysis led by FAO/WFP/NBS. This report, however, points out that staple foods (rice and sorghum) were usually imported from neighbouring countries.

Kwajok is a trade hub and feeder market that supplies secondary markets with local and imported produce. These secondary markets are supplied with produce transported through private cars, boda-bodas (public motorbike taxis) or bicycles. Trucks are less used because of poor road conditions, which make roads practically impossible to pass during the rainy season. Activity peaks during rainy season as prices soar, and merchants’ revenues increase. Kwajok market is easy to access on the B38 highway from Wau.<sup>128</sup> In both Twic East and Duk, consumers noted that most stands in the markets were owned by traders from other communities notably “Darfurians” while other stand owners included IDPs, returnees and “foreigners.”<sup>129</sup>

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<sup>126</sup> World Vision South Sudan. (2014). *Warrap - Rapid Market Assessment*.

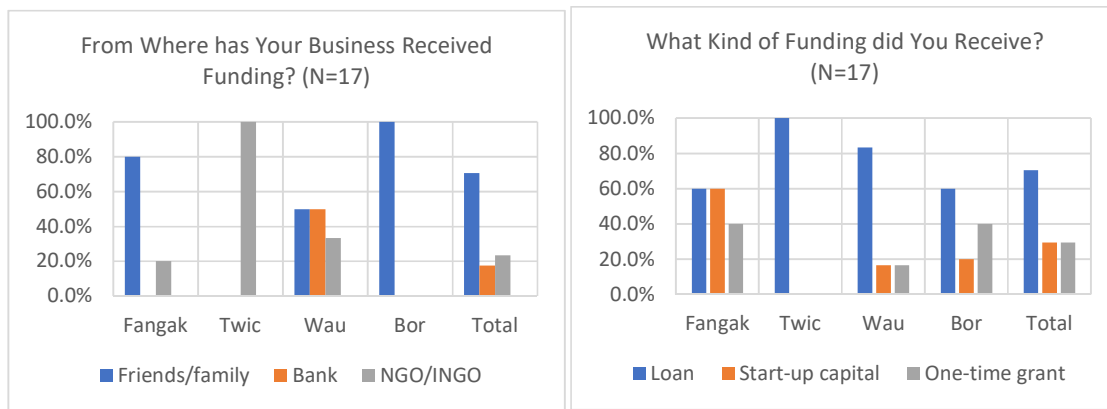
<sup>127</sup> Norwegian Refugee Council. (2017). *Rapid Market Assessment Report; Wau County South Sudan*.

<sup>128</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

<sup>129</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

### 2.2.5. Access to Financial Assistance

Figure 20: Source and Type of Funding Received



Less than 10% of all the vendors surveyed (17 out of 180) have received external funding for their businesses. The Figure 20 shows that ‘friends and family’ was the most commonly cited source of funding in Fangak and Bor. In Twic, the funding comes entirely from NGOs/INGOs while in Wau, banks as well as family and NGOs are reported as active sources of funding. Most of this funding comes in the form of loans.

Most loans, start-up capital and grants come from friends/family (70.5%, N=12). In a few cases, vendors reported that they have received loans from NGOs (23.5%, N=4) or loans and start-up capital from banks (17.6%, N=3). Businesses which have obtained some form of funding are detailed in the table below.

Table 11: Domains of Work of Vendors Who have Taken Some Form of External Funding

Type of Funding	Domain of work of vendor
Only loan	Barber/hairdressing, carpentry, appliance repair, retailer
Both loan and start-up capital	Appliance repair
Both loan and one-time grant	Hospitality service
Only one-time grant	Mobile charging service, tailoring

### 2.2.6. Access to Tools and Toolkits

Of the total vendors interviewed, only 10% (N=18) reported that they have received start-up toolkits, with most toolkits (N=10) being distributed in Wau. The vendors in Wau reported that the toolkits contained tools, spare parts, inputs and manuals, but only vendors in Juba reported that the toolkits contained some money to start their business. The table below shows vendors who received toolkits and their type of businesses disaggregated by location.

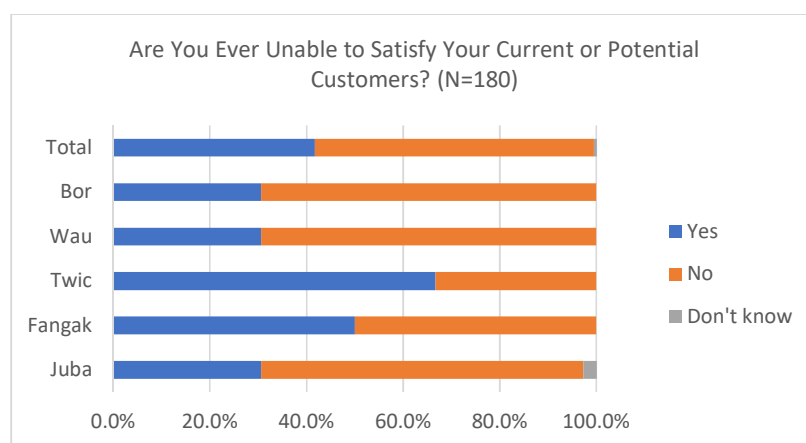


Table 12: Number and Type of Businesses which have Received Toolkits

Number and type of businesses which have received toolkits		# of vendors
<b>Juba</b>	1 Printing	1
<b>Twic</b>	1 Retailer, 1 Carpentry	2
<b>Wau</b>	2 Appliance repair, 1 Catering Appliance repair, 1 Systems installation, 1 Retailer, 1 Driving	6
<b>Bor</b>	1 Hospitality services, 1 Barber/hairdresser	2

### 2.2.7. Responding to Consumer Demands

Figure 21: Vendor's Ability to Satisfy Consumer Demands



Two-thirds (66.7%, N=24) of the vendors in Twic and 50% (N=18) of the vendors from Fangak said that they are unable to satisfy all current and potential customers. This number was smaller, but still substantial, in other locations. In all locations, this difficulty was faced by vendors every day or every few days.

When asked for the reason for their inability to meet customer demands, vendors most commonly mentioned the following reasons: i) not enough sources to buy stock, ii) not enough capital/money to buy stock, iii) sources cannot supply enough and iv) cost of transport. These problems coincide with the lack of external funding available for running the businesses smoothly. In Juba, cost of transport, lack of workers and low quality of products were also stated as important reasons.

In Twic, like many other locations, a sizable proportion of vendors also cited cost of transport as a barrier. From the rapid market assessment conducted by World Vision in Twic in 2014, "Traders interviewed noted that transporters were no longer willing transport goods along the route from Juba to Wau and beyond due to insecurity. In an effort to improve security, more check points or 'road blocks' were introduced on the roads. These roadblocks and checkpoints resulted in greater opportunities for extortion and rent seeking, representing an added cost for transporters, which were passed on to wholesalers, traders and ultimately consumers."<sup>130</sup> Thus, if the situation is as precarious as in 2014, then the cost of transport is expected to be constantly impacted.

<sup>130</sup> World Vision South Sudan. (2014). *Warrap - Rapid Market Assessment*.

The vendors also felt that the lack of supply and the price of goods left many of their customers dissatisfied with their products. For example, barbers in Juba complained about lack of electricity, and a vendor in the hospitality business talked about his inability to cook due to financial difficulties leaving his clients dissatisfied. The IOM study in Wau found similar financial constraints: “A large proportion [of vendors] (40.5%, n=17) felt that they were sometimes unable to meet demand, suggesting that there is a lot of room for growth in the market as there is a high rate of unmet demand for goods and services. The most common reason that respondents felt they were sometimes unable to meet demand was a lack of finance[;] of those who felt they were sometimes unable to meet customer demand, 41.2% (n=7) indicated that this was primarily due to a lack of finance to buy more stock.”<sup>131</sup>

A list of the most frequently cited reasons of vendors’ inability to satisfy customer demands is given below.

Table 13: Reasons Why Vendors were Unable to Meet Customer Demand

Reasons	Juba (N=11)	Fangak (N=18)	Twic (N=24)	Wau (N=11)	Bor (N=11)	Total (N=75)
Not enough sources to buy stock	63.6%	72.2%	29.2%	72.7%	18.2%	49.3%
Sources cannot supply enough	27.3%	27.8%	33.3%	27.3%	27.3%	29.3%
Lack of capital/money to buy stock	54.5%	50.0%	20.8%	54.5%	36.4%	40.0%
Lack of money to buy more	54.5%	38.9%	29.2%	18.2%	36.4%	34.7%
Cost of transport	27.3%	38.9%	16.7%	9.1%	18.2%	22.7%
Lack of workers	18.2%	0.0%	0.0%	0.0%	0.0%	2.7%
Workers insufficiently trained	0.0%	0.0%	4.2%	0.0%	9.1%	2.7%
Low quality of products available	27.3%	5.6%	0.0%	0.0%	18.2%	8.0%
Design/style is inappropriate	0.0%	5.6%	0.0%	0.0%	0.0%	1.3%
Other	9.1%	0.0%	0.0%	9.1%	0.0%	2.7%

In Twic East and Pibor, most business owners indicated that they were able to satisfy customer demand. However, a majority of business owners in Duk county said that they have struggled to meet consumer demand in some cases.<sup>132</sup> Should insecurity, road conditions and the availability of capital improve, there is significant room for market expansion in Duk and Pibor given all the unmet consumer demand.<sup>133</sup> In general, the local production of goods is in higher demand than service provision.<sup>134</sup>

#### 2.2.8. Interaction with Traders and Brokers

Trade/business associations and cooperatives exist in all locations. A large majority of the vendors claim to be satisfied with the traders in their area. However, in Twic, a little over quarter of the vendors said they never use any traders. A lack of supply of goods was declared as the main reason for their dissatisfaction (mentioned by 55.9% of all traders, N=100).

<sup>131</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

<sup>132</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

<sup>133</sup> *Ibid.*

<sup>134</sup> UNESCO. (2018). *Rapid Assessment of the Technical and Vocational Education and Training (TVET) Sector in South Sudan*.

Of all the vendors surveyed, 24.3% (N=44) of them work with brokers while purchasing stock or raw materials. In Juba, Fangak and Twic, vendors were largely satisfied with their brokers. In Wau and Bor, the two main sources of dissatisfaction with brokers were high prices and brokers' impoliteness. A GIZ study found taxation in the market to be another impactful factor felt by vendors. "The taxation system is still very informal in most markets. Taxes should be determined by incomes, but in reality, the market manager applies a system where he taxes merchants based on the size of their stalls and his perception of their level of activity. No market manager was reported to use weighing scales to gauge the quantity of goods sold."<sup>135</sup>

### 2.2.9. Prevalence of Vocationally Trained Market Actors

Nearly a third (N=59) of the total vendors surveyed received vocational or skills training. The table below details the sectors in which training was received. It appears that training is overall concentrated in the business domain with 18.6% (N=11) having received business management training, 15.2% (N=9) having received marketing training and 13.5% (N=8) having received training in finance/accounting.

In Juba, 30% of the vendors reported having received training in administrative office work while 20% reported having received training in business, accounting and literacy. In Fangak, 40% have received training in business marketing, followed by 30% each in business entrepreneurship, accounting and subsistence agriculture. In Twic, 16.7% of vendors have received beautician, business marketing, doctor/nurse and literacy training. In Wau, 35.7% have received training in computers/ICT and business entrepreneurship. A very small percentage of vendors have received some training as electricians and in generator repair. In a KII with a community leader, appliance repairs was mentioned as a trade with high demand and low supply. In Bor, 23.1% have received training in computers/ICT.

The following table lists the types of training and number of vendors who received these trainings, disaggregated by location.

Table 14: Types of Businesses Whose Owners have Received Vocational Trainings

Businesses owners who have received vocational trainings	
<b>Juba</b>	3 office management, 1 animal healthcare, 1 beautician, 1 business (management), 2 business (finance), 1 business (marketing), 1 language skills, 1 tailoring, 2 literacy, 1 numeracy
<b>Fangak</b>	1 agriculture (ox plough), 3 agriculture (subsistence), 3 business (management), 3 business (accounting), 4 business (marketing), 2 fishing, 1 retailer, 1 food preparation
<b>Twic</b>	2 beautician, 1 business (management), 1 business (accounting), 2 business (marketing), 2 healthcare, 1 auto mechanic, 1 retailer, 1 welding, 2 literacy, 1 numeracy
<b>Wau</b>	1 office management, 5 business (management), 1 business (accounting), 1 business (marketing), 5 computers/ICT, 2 electrician, 1 generator repair, 2 healthcare, 2 language, 1 tailoring, 2 teaching
<b>Bor</b>	1 office management, 2 agriculture (mechanised), 2 hairdressing, 1 business (management), 1 business (accounting), 1 business (marketing), 2 carpentry, 3 computer/ICT, 2 healthcare, 1 housecleaning, 1 language, 1 retailer, 1 restaurant service, 1 teaching, 1 literacy

<sup>135</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

In Juba, 50% (N=4) of the vendors who employed vocationally trained persons reported that between one and four employees of their business have received some sort of vocational training. This percentage was higher in Fangak (83.3%, N=5), Twic (79%, N=15) and Bor (66.7%, N=6).

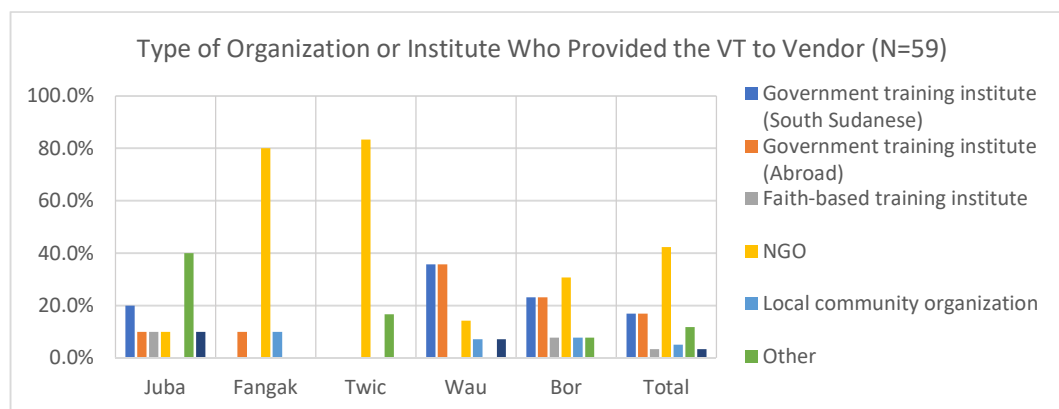
Trades which were observed to have the highest number of vocationally trained employees were driving (N=6), hospitality services (N=5), dobbi (N=2), electronics (N=2), retailer or general traders (N=2). One vendor from each of the trade domains of barber, beautician, carpentry, masonry, mobile charging service<sup>136</sup>, boda mechanic, welding and printing also mentioned they had between one to four trained employees. The table below contains a list of businesses which hired employees with some vocational training by location.

Table 15: Businesses Employing Vocationally Trained Employees

# of vocationally trained employees hired by businesses	
<b>Juba</b>	3 driving, 1 hospitality services, 1 printing
<b>Fangak</b>	No skilled domains
<b>Twic</b>	2 dobbi / dry cleaning, 2 hospitality services, 2 retailers, 1 beautician, 1 carpentry, 1 welding, 1 driving
<b>Wau</b>	2 appliance repair, 2 driving, 1 mobile charging services,
<b>Bor</b>	2 hospitality services, 1 barber/hairdresser, 1 boda mechanic, 1 masonry

### Providers of Vocational Trainings

Figure 22: Vocational Training Providers Reported by VT Trained Vendors

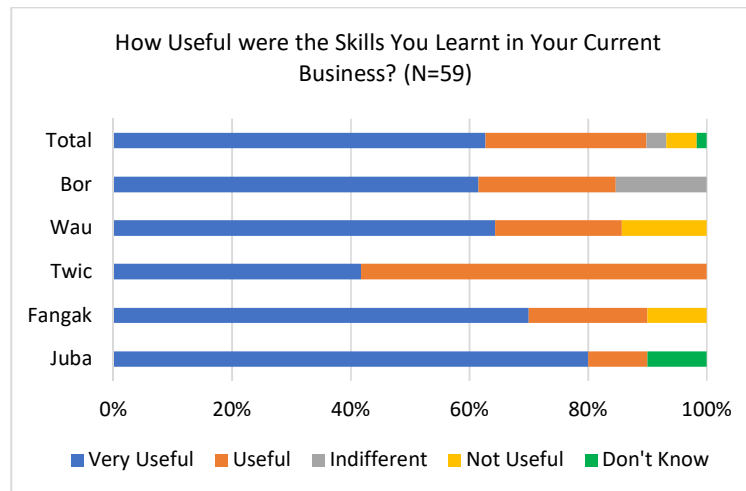


In Fangak and Twic, 80% (N= 8, N=10 respectively) of vendors received VTs from NGOs. In Wau, government training institutes, both in South Sudan and abroad, provided trainings to 35.7% (N=5) of vendors each. NGOs only provided the VT to two vendors in Wau. In Bor, NGOs provided vocational trainings to 30% (N=4) of Bor VT trained vendors, followed by government training institutes who trained 23% (N=2) of VT trained vendors.

<sup>136</sup> Mobile charging service is defined as the charging of any device such as torches, phones, power banks or chargeable solar panels

## Usefulness of VT Skills Learnt in Current Business

Figure 23: Usefulness of VTs



The graph above demonstrates that 90% (N=53) of the respondents who received vocational training found it either very useful or useful in their current business. Two vendors in Wau and one vendor in Fangak participated in vocational training offered by an NGO, but they did not find the acquired skills useful for their current job.

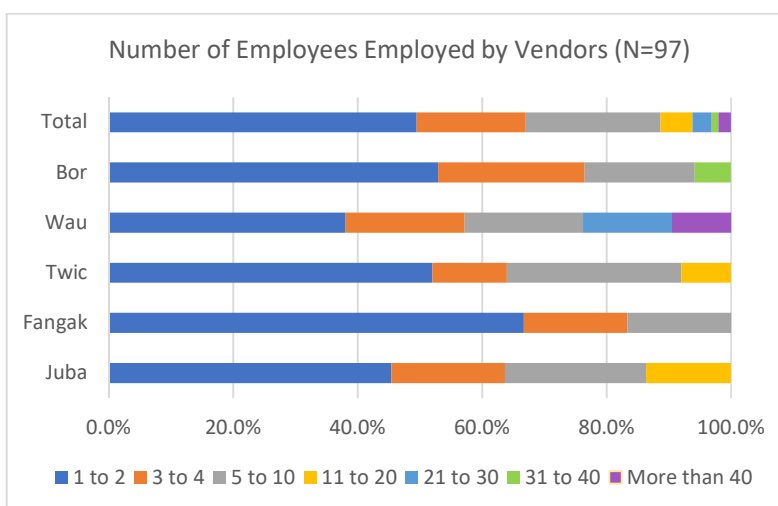
### 2.2.10. Recruitment Trends and Challenges

#### Prevalence of Employer Businesses<sup>137</sup>

The majority of vendors in all locations, except in Fangak, were not sole-practitioners or sole-traders, but actually employed others. However, these are mostly small businesses employing one to two people (in all locations except Wau). As shown in Figure 24, the distribution of different sized businesses varies slightly across locations. In Twic, for instance, there is a slightly higher prevalence of bigger businesses while Wau is the only location to have a business working in the transport and logistics field which employs more than 40 people.

<sup>137</sup> Here, the size of businesses are categorized based: small if employing one to four persons, medium if employing five to 30 persons and big sized if employing 31 or more persons.

Figure 24: Number of Employees in Employer Businesses



Hospitality businesses constitute the highest number of employers (22%, N=9) across all locations. However, most of them employ only one to two people. Transport and logistics were the second most commonly mentioned employers, and they hire the largest number of employees (most employed between 5 to 30 employees while one business even employed more than 40 people). Hairdressing and catering (N=3 each) represent 7.5% each of all employer businesses. The table below summarizes the number of people that each type of business employs.

Table 16: Types of Employer Businesses Present and Number of People They Employ

Domain	Number of employees						Total
	1 to 2	3 to 4	5 to 10	11 to 20	31 to 40	>40	
Barber/hairdresser	0	1	2	0	0	0	3
Beautician	0	1	0	0	0	0	1
Catering	1	1	1	0	0	0	3
Carpentry & joinery	0	1	0	0	0	0	1
Construction	1	0	0	0	0	0	1
Dobbi/dry cleaning	1	0	0	1	0	0	2
Appliance repair	2	0	0	0	0	0	2
Hospitality services	5	0	3	1	0	0	9
Masonry	0	0	0	0	1	0	1
Mobile charging service	2	0	0	0	0	0	2
Mechanic – Boda	0	1	1	0	0	0	2
Retailer	2	0	0	0	0	0	2
Tailoring and fashion	1	0	0	0	0	0	1
Welding/metal work	1	0	0	0	0	0	1
Driving	1	1	3	2	0	1	8
Printing & design	0	0	0	1	0	0	1
Total	17	6	10	5	1	1	40

### Availability of Master Craftsmen

Vendors from all locations reported the presence of master craftsmen or master tradesmen in their area, albeit to a varying degree across locations. The highest number of businesses that reported working with master craftsmen were in Fangak (52.8%, N=17), followed by Twic (30.6%, N=7), Wau (25%, N=4), Bor (22.2%, N=4) and Juba (22.2%, N=4). For example, "Local producers in Wau are forced to farm without the benefit of tractors and rely primarily on imported tools as few blacksmiths are available. 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."<sup>138</sup> The most frequently cited businesses that work with master craftsmen are operating mobile charging businesses (20%),<sup>139</sup> retailers (20%) and transportation companies (15%). The table below highlights detailed information on businesses that work with master craftsmen across locations.

Table 17: Number and Domain of Businesses which Reported Working with a Master Craftsman

Trade domain	Juba	Fangak	Twic	Wau	Bor	Total
Barber/hairdresser	1	0	0	0	0	1
Carpentry and Joinery	1	0	1	0	0	2
Dobbi /Dry cleaning	0	0	2	0	0	2
Electronics repair	0	0	0	1	0	1
Hospitality services	0	0	1	0	1	2
Mobile charging service	0	1	0	1	2	4
Mechanic – Boda	0	0	1	0	0	1
Retailer / General Trader	0	3	0	1	0	4
Driving	2	0	0	1	0	3
Total	4	4	5	4	3	20

### Mentoring

Nearly 30% (N=53) of all businesses reported having taken on mentees. Wau appears to have the highest number of mentor businesses (41.6%, N=14), followed by Fangak (33%, N=12), Juba (27.7%, N=10), Twic (25%, N=9) and finally Bor (19.4%, N=7). One example of mentorship and its connection to VT provision is found in the IOM study in Wau, in which "none of the workers interviewed at the carpentry workshop had received formal vocational training in carpentry despite the long presence of vocational training courses in carpentry in Wau. This suggests that for trades where there is already an existing informal process of training, vocational training is less relevant to the needs of the local populace."<sup>140</sup>

Hospitality services and retailer businesses each represent 20% (N=4) of businesses that reported having a mentorship or apprenticeship programme, followed by hairdressing businesses (15%, N=3). The table below provides more details about other businesses which have mentored trainees.

<sup>138</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com).

<sup>139</sup> N=20

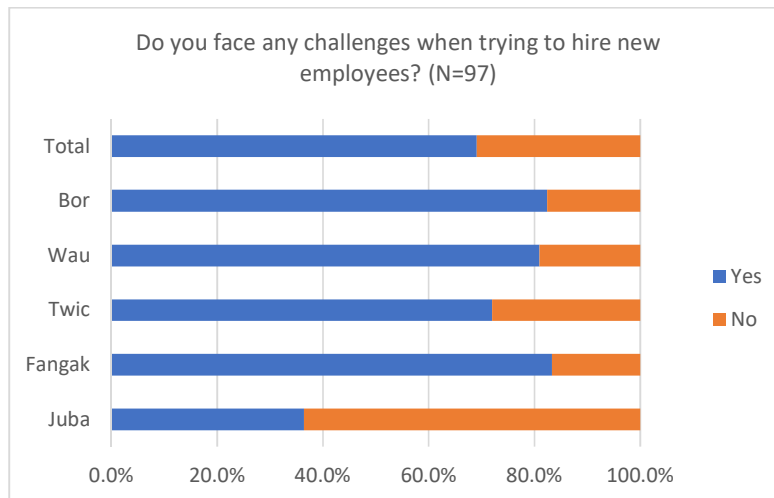
<sup>140</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com).

Table 18: Number and Type of Businesses which have Trained Mentees

	Number and type of businesses which have trained mentees	Total
Juba	1 Barber/hairdresser, 1 Hospitality services, 1 Driving, 1 Printing and design	4
Fangak	2 Retailer	2
Twic	2 Retailer, 1 Carpentry	3
Wau	2 Appliance repair, 1 Barber/hairdresser, 1 Systems installation, 1 Hospitality services, 1 Tailoring and fashion, 1 Driving	7
Bor	2 Hospitality services, 1 Barber/hairdresser, 1 Mobile charging services	4

Recruitment Challenges

Figure 25: Prevalence of Employers Facing Hiring Difficulties



Almost 70% (N=67) of the vendors who operate employer businesses reported facing challenges when hiring new employees. The proportion is the lowest in Juba (36.4%, N=8). Two of the most commonly faced challenges in recruitment in all locations were a lack of well-trained candidates, and candidates' expectations to receive high salaries. However, there remains an unconfirmed possibility that vendors would be willing to pay higher salaries for the candidate with the desired skills. In addition, lack of customer service skills was a big challenge in Juba, Fangak and Wau. Lack of candidates in general was also a challenge in Twic and Wau.



Table 19: Challenges Faced when Trying to Hire New Employees

Challenges	Juba (N=8)	Fangak (N=10)	Twic (N=18)	Wau (N=17)	Bor (N=14)	Total
Lack of candidates in general	0.0%	10.0%	27.8%	29.4%	14.3%	19.4%
Lack of well-trained candidates	62.5%	50.0%	55.6%	35.3%	50.0%	49.3%
Candidates want higher salary	62.5%	70.0%	33.3%	82.4%	71.4%	62.7%
Negative perception of the trade	0.0%	0.0%	0.0%	5.9%	28.6%	7.5%
Candidates lack motivation	0.0%	10.0%	0.0%	11.8%	7.1%	6.0%
Bad attitude of candidates	12.5%	0.0%	11.1%	17.6%	7.1%	10.4%
Lack customer service skills	62.5%	50.0%	11.1%	47.1%	7.1%	31.3%

### 2.2.11. Business Growth Avenues and Support Required

#### Business Competitiveness

Over 80% of the businesses felt that they were able to compete with others selling similar goods and services in the same market. In Juba, driving, hospitality and carpentry reported the highest number of competitors ranging from 1-5 competitors (for driving and hospitality) to more than 100 estimated competitors (for carpentry). In Twic, Wau and Bor, hospitality emerged as the most competitive business.

The table below illustrates the number of competitor businesses reported by vendors (represented by their domain) in each location. For instance, “1 Computer” refers to one vendor working in the Computer/ICT domain stating he/she has one to five competitor businesses.

Figure 26: Number of Competitor Businesses and Domain Reported

# of competitor businesses	Juba	Fangak	Twic	Wau	Bor
<b>1 to 5</b>	1 Computer, 1 Hospitality, 1 Driving		1 Barber, 1 Beautician, 1 Carpentry, 1 Dobbi, 2 Hospitality, 1 Welding, 1 Driving	1 Hospitality, 1 Mobile charging, 1 Driving	1 Hospitality, 1 Masonry, 1 Mobile charging
<b>6 to 10</b>	1 Catering, 1 Boda Mechanic, 1 Driving	1 Mobile charging	1 Dobbi, 2 Retailer	1 Catering, 1 Appliance repair, 1 Hospitality, 1 Retailer, 1 Tailoring	
<b>11 to 20</b>	1 Catering, 1 Hospitality, 3 Driving			1 Systems installation, 1 Hospitality, 1 Driving	2 Hospitality, 1 Appliance repair, 1 Boda mechanic

# of competitor businesses	Juba	Fangak	Twic	Wau	Bor
21 to 40	1 Barber		1 Boda Mechanic	1 Barber	2 Tailoring, 1 Barber
41 to 60	1 Hospitality, 1 Driving				
61 to 80	1 Printing				
81 to 100	1 Carpentry	1 Retailer			1 Mobile charging
More than 100	1 Carpentry		1 Hospitality	1 Appliance repair	1 Tailoring

### Barriers to do Business

The vendors were asked to name the biggest challenges they face in doing business in their local market. More than 45% (N=81) of the vendors cited a lack of access to savings and loan groups as well as insecurity due to fighting and conflict as their major barriers. These were followed by lack of skilled labour, high financial costs to set up the business and high financial costs to operate and run the business. In Juba, notably, 41.7% (N=15) businesses also felt that the low purchasing power of customers makes it difficult to do business. In Wau specifically, “The main barrier fishermen reported in securing an adequate livelihood was a lack of fish, especially during the dry season. The Ministry of Animal Resources and Fisheries reported that there is a problem with overfishing in the area, which is also a contributing factor to this problem. Fishermen interviewed were keen to learn how to farm fish, but had no knowledge on how to attempt this currently.”<sup>141</sup> The problem with insecurity and high transport costs due to bad weather conditions was highlighted in the KII interviews in all locations. In the KII interviews with farmers in Bor and Juba, they also mentioned heavy losses due to destruction by animals as they do not have adequate fencing around their farms or storage spaces.

The response distribution for the various barriers captured through the quantitative survey is demonstrated below for each location.

Table 20: Challenges Faced by Vendors to do Business in Their Local Market

Challenge	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Lack of access to saving and loans group	58.3%	47.2%	25.0%	30.6%	75.0%	47.2%
Insecurity due to fighting / conflict	47.2%	61.1%	25.0%	47.2%	44.4%	45.0%
Lack of skilled labour	16.7%	30.6%	27.8%	30.6%	36.1%	28.3%
Negative perception of certain trades	2.8%	11.1%	2.8%	2.8%	22.2%	8.3%
Low purchasing power of customers	41.7%	2.8%	22.2%	16.7%	13.9%	19.4%
Shortage of essential products	5.6%	5.6%	16.7%	22.2%	5.6%	11.1%
High financial cost to setup business	30.6%	16.7%	16.7%	33.3%	13.9%	22.2%
High financial cost to maintain a business	41.7%	13.9%	11.1%	13.9%	19.4%	20.0%
Administrative difficulties to setup business	11.1%	0.0%	0.0%	5.6%	2.8%	3.9%
Shortage of good quality raw material	11.1%	5.6%	13.9%	13.9%	8.3%	10.6%
Low profit margins	19.4%	8.3%	0.0%	2.8%	27.8%	11.7%

<sup>141</sup> *Ibid.*

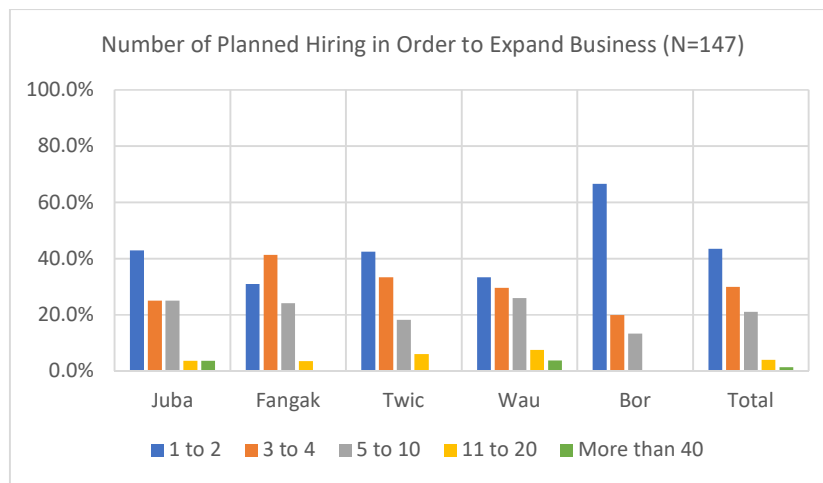
Challenge	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Nepotism	8.3%	2.8%	0.0%	2.8%	0.0%	2.8%

Based on the WFP definition of market integration, where changes in one market are related to changes in others, a CARE International study found that the three markets in the former state of Jonglei show very little integration. While the supply chain in Pibor market seemed to be functioning adequately, this was not the case in Duk or Twic East, and it was unclear if or how Pibor impacts the other two markets.

### Business Expansion Plans

An overwhelming majority (93.3%, N=168) of all vendors have business expansion plans for the future, and 90% (N=171) of them said they will require trained workers to carry out this expansion. However, the volume of recruitment can be expected to be low as most businesses across all locations (except Fangak) will hire one to two persons followed by a smaller proportion of vendors who will hire three to four workers.

Figure 27: Number of Planned Hiring



Despite the high number of already existing competitors, of the vendors who planned expansion, the majority were from the hospitality services (11 out of 57 vendors or 19.2%) and driving sector (14%, N=8). This shows the demand for the services by consumers as well as the potential demand for skilled labour in these sectors when the expansion will take place. The other vendors planning for expansion were retailers (10.%, N=6), barbers (7%, N=4), mobile charging services (7%, N=4) and tailoring (7%, N=4).

In Juba, it is the vendors from hospitality and driving services that will be looking to hire anywhere between one to 20 workers. In Fangak, the retail business providers will aim to hire up to ten workers. In Twic also, the hospitality service providers aim to hire more workers. In Wau, there will be demand for up to ten workers from the appliance repair, driving and hospitality vendors. Finally, in Bor, the demand for up to ten workers is likely to come from the hospitality and mobile charging sectors. The hiring intentions and volume for each trade in each location is summarised in the Table 21.

Table 21: Detailed Hiring Projections by Domain

# of hiring	Juba	Fangak	Twic	Wau	Bor
1 to 2	2 Hospitality, 1 Computer/ICT, 1 Driving	1 Retailer	2 Dobbi, 1 Hospitality, 1 Retailer, 1 Welding	1 Appliance repair, 1 Tailor, 1 Driving	1 Barber, 1 Construction, 1 Appliance repair, 2 Hospitality, 1 Masonry, 1 Mobile charging, 3 Tailors
3 to 4	1 Barber, 1 Catering, 1 Hospitality, 1 Driving	1 Mobile charging, 1 Retailer	1 Carpentry, 1 Retailer	1 Barber, 1 Catering, 1 Hospitality, 1 Mobile charging	1 Hospitality, 1 Mobile charging, 1 Boda Mechanic
5 to 10	1 Boda Mechanic, 1 Driving, 1 Printing	1 Retailer	1 Beautician, 1 Hospitality, 1 Boda Mechanic	1 Appliance repair, 1 Hospitality, 1 Retailer, 1 Driving	1 Hospitality, 1 Welding
11 to 20	1 Driving		1 Barber 1 Driving		

Beyond human resources, expansion can also include improvement of assets. The GIZ study in Wau market found that “merchants’ primary desire is to have larger stalls to sell goods on. Very few expressed a desire for protection from the elements and none expressed a desire for electricity. Very few saw packaging as priority. Merchants favoured shared warehousing over individual storage. Merchants see storage space as a way to save on transportation costs and increase product shelf life. Some of those who preferred individual storage, within their store would pay someone to watch over their products at night if necessary.”<sup>142</sup> All these elements are possible points of improvement for expansion, yet in ways that would not directly provide greater employment.

In terms of the viability of existing markets in the secondary locations and the potential for expanding the products in those markets, several challenges have been identified. These include the lack of agricultural tools, the high price of the dollar vis-à-vis the SSP, the poor quality of produce and the poor quality of roads. The most frequently cited challenge to market viability and market or product expansion is the lack of agricultural tools (e.g., ox-plough, tractors and veterinary tools).<sup>143</sup>

#### Support Required for Business Growth and Increase Ability to Compete

<sup>142</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*.

<sup>143</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

Around 17% (N=31) of all vendors surveyed feel that they are not able to compete with other similar businesses in their local market. Thus, in order to overcome their barriers, they were asked about the kind of support they need in order to nurture their businesses and increase competitiveness.

In Juba, all vendors stated that access to capital is essential. Half of the vendors also wished for more access to training and more access to skilled workers. In Fangak, over half of the vendors wanted access to more skilled workers followed by access to capital. In Twic, the requirement for training is the biggest need, followed by access to capital and skilled workers. In Wau, 66.7% vendors want more capital, and 33.3% want access to better goods/products. In Bor, the demand for skilled workers and better transport networks is the highest and came from 75% of the vendors. The full response distribution is given below.

Table 22: Support Required by Vendors to Grow and Become More Competitive

Type of support	Juba (N=4)	Fangak (N=9)	Twic (N=5)	Wau (N=9)	Bor (N=4)	Total (N=31)
Access to capital	100.0%	44.4%	20.0%	66.7%	25.0%	51.6%
Access to training	50.0%	22.2%	60.0%	22.2%	0.0%	29.0%
Access to more skilled workers	50.0%	55.6%	20.0%	22.2%	75.0%	41.9%
Access to better goods/products	0.0%	0.0%	0.0%	33.3%	25.0%	12.9%
Better transport networks	25.0%	22.2%	0.0%	22.2%	75.0%	25.8%
Don't Know	0.0%	0.0%	0.0%	11.1%	0.0%	3.2%

Vendors were also asked whether they would be interested in trainings to gauge their self-perception about the skills they require. A vast majority of the vendors were interested in training, specifically business trainings (83.9%, N=149), followed by 38.9% (N=70) interested in technical skills within their own domain and 35% (N=63) interested in language skill trainings. A small proportion of 15% (N=27) and 9% (N=16) were also interested in literacy and numeracy skills, respectively.

Regarding the secondary locations, both producers and consumers in Pibor and Duk were not yet ready for significant value-added modifications to existing products in markets as there is neither the demand nor the capacity to supply such improvements. The focus of any improvements should be to increase the volume and efficiency of supply to markets, so that they are less susceptible to seasonal scarcity and so that supply can better respond to the existing demand pushing prices down for consumers.<sup>144</sup>

In Kwajok, GIZ found that producers are not specialised and do not have optimal market power operating as individuals, so grouping them together could increase production and margins.<sup>145</sup> The study suggests one avenue of growth is to develop producers' associations in order to accumulate gains in supply. For specific sectors, flour, sugar, teashops, restaurants and mobile phone repair are all goods/services with high demand and low consumer satisfaction in Kwajok<sup>146</sup> and therefore are sectors

<sup>144</sup> *Ibid.*

<sup>145</sup> Altai Consulting and GIZ. (2013). *Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States*

<sup>146</sup> Forcier, Natalie, Kevin, Nadia and Whitaker, Conrad. (2013). *Creating an Evidence Base For Effective Vocational & Livelihoods Training: A Comparative Analysis of Twenty-Four Market Assessments throughout South Sudan*. ILO, MDGF.

with room for growth. In Lainya, there is high demand for oil, flour and goat meat, and these are the sectors with the most room for growth as per the IOM study.

#### Most and Least Profitable Businesses

In order to get a sense of perceptions about profitability of the various trades present in the market, vendors were asked to choose the types of businesses which they thought to be the most and least profitable. Consequently, a clear trend emerged at least for the trade perceived to be the most profitable. Most vendors in all locations, except Twic, considered consumer goods/general store businesses to give maximum profits. In Twic, the top choice was split between the business of selling imported clothes and footwear as well as the restaurant business.

Trends for the least profitable businesses varied immensely across locations. In Juba, selling fruits, vegetables and hairdressing were considered the least profitable businesses. In Fangak, businesses selling locally made clothes and footwear, dried or smoked fish, eggs and businesses selling sand and gravel were considered to be the least profitable. In Twic and Wau, selling charcoal is thought to be the least profitable. In Wau, a quarter of the vendors viewed the business of selling eggs to return the least profits.

The main income-generating activities in the three Jonglei locations include agriculture, fishing and livestock-related activities. Most vendors and producers agreed that the most profitable businesses sell agricultural goods. The least profitable businesses include dobbi (clothes-washing), fishing and the sale of clothing.<sup>147 148</sup>

#### Perceptions About Factors for Successful Business

In Juba, a majority of the vendors (69.4%, N=25) believe that access to capital is the most important factor that determines success of a business in their local market. This was followed by other factors such as the level of demand for products and services (reported by 50%, N=18) and availability of skilled workers (reported by 47.2%, N=17). Additionally, vendors added support from governments and NGOs for capital as well as good management and language skills were slightly less important but nevertheless influential on business success.

In Fangak, good transport networks are considered crucial for business success according to 55.6% (N=20) of vendors. The vendors additionally mentioned support from NGOs and cooperation among traders as additional factors. In Twic, access to capital and good transport networks were reported as important factors of success by slightly over half of the vendors. In Wau, a majority (72.2%, N=26) of the vendors believe that access to capital determines success. Finally, in Bor, a good transport network and access to capital are considered crucial for business success by 75% (N=27) and 72.2% (N=26) of vendors, respectively.

In terms of skills, business, language and trading skills in their profession are considered as very important for a business owner to have in all locations. In Juba and Bor, the importance of connections was also mentioned by respondents. In the FGDs as well, participants highlighted multiple times that

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<sup>147</sup> KII with Producer Duk county 28 March 2017; KII with Vendor Duk County 31 March 2017.

<sup>148</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

jobs and training opportunities are frequently given to those whose fathers have connections at higher places. Vendors also stressed the importance of security for businesses to run smoothly.

Beyond the factors that help a business succeed, business owners in Pibor, Duk, and Twic East highlighted the skills that owners themselves must have in order for their enterprises to be successful. Business skills were the most widely mentioned skills necessary for both business owners and producers followed by language skills, which includes knowledge of local languages, the capacity to provide quality customer service and the capacity for effective business development.<sup>149</sup>

#### Support Needed for Increasing Youth Access to Employment or Start Businesses

In order for youth to access jobs, 70.6% (N=126) of the vendors believe that quality technical training is the most essential factor. Following quality technical training, 36.7% (N=66) expressed the need for youth to be trained on soft skills, 34.4% (N=62) for awareness about job openings and 33.9% (N=61) for financial assistance to pay for trainings. The response distribution was similar within each location.

When speaking about the challenges of teaching good verbal communication, the director of Juba Catering Services noted, “After twenty years of fighting, you don’t have anybody saying things like ‘please’ and ‘thank you.’ You need to teach these youth how to even speak to people.”

In order for youth to start their own businesses, 75.6% (N=136) of vendor respondents believe that quality business skills training is of great importance. Close to half (48.9%, N=88) of the respondents talked about the importance of start-up capital while 40.6% (N=73) respondents talked about awareness of business opportunities. Some respondents in Juba also mentioned that young people could form groups to run businesses together such as distribution of water. Adult women education was also highlighted as an important factor to equip more people with the skills to start their own businesses.

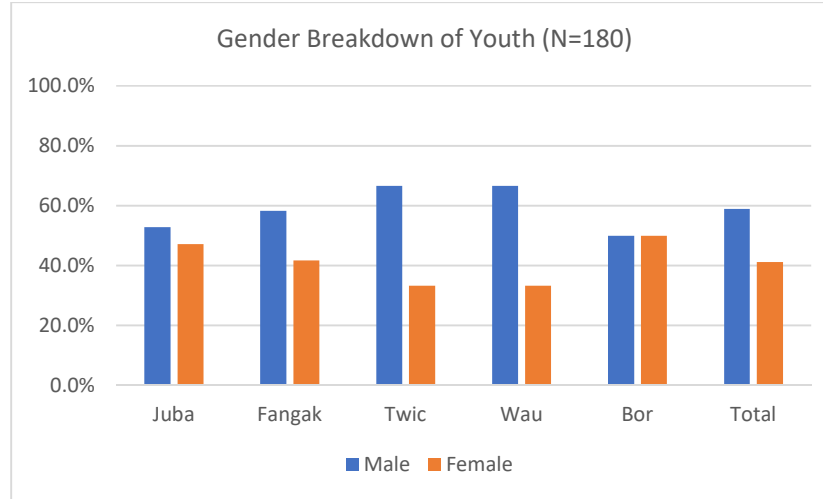
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<sup>149</sup> *Ibid.*

## 2.3. Youths' Perspectives

### 2.3.1. Youth Demographics and Household Income

Figure 28: Gender Breakdown of Youth



In Juba and Bor, the sample was nearly equally divided between male and female youth. In Fangak, Twic and Wau, the proportion of male respondents was higher than female. The majority of youth surveyed are South Sudanese nationals and residents, except in Wau PoC, where 100% of the youth respondents are IDPs. The majority of respondents are aged between 20 and 29 years across all locations and belong to medium-sized households of five to nine people (with the exception of Fangak). On average, six people are dependent on the youth's income in Juba, Twic and Wau, while an average of ten people are dependent on youth income in Fangak and Bor. The youth sample was nearly equally made up of married and unmarried persons with Juba having a slightly higher prevalence of unmarried youth.

Juba and Twic youth are slightly more educated as over half the sample had completed some secondary schooling. In Fangak, Wau and Bor, the majority of youth had done some or no primary schooling.

#### Youth Household Income

Table 23: Youth Household Income in the Last Month, by Location (in SSP)

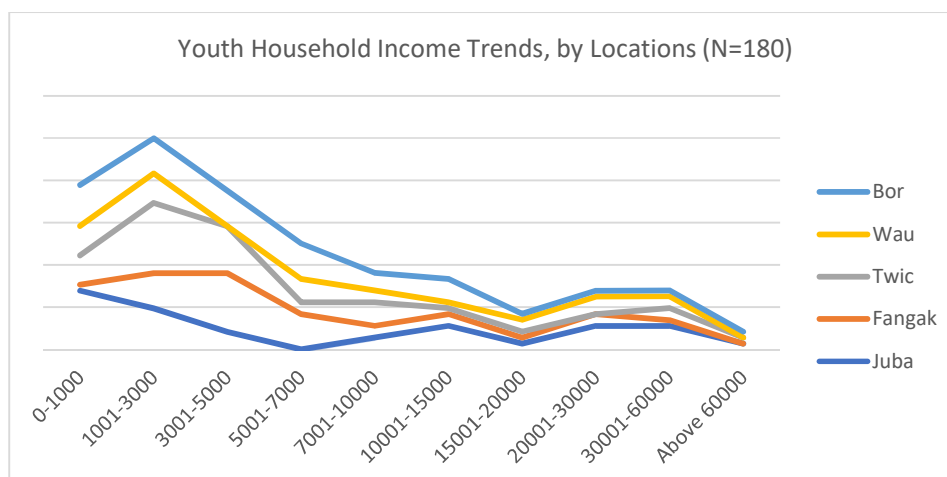
Income bands	Juba (N=26)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
0-1000	27.8%	2.8%	13.9%	13.9%	19.4%	15.6%
1001-3000	19.4%	16.7%	33.3%	13.9%	16.7%	20.0%
3001-5000	8.3%	27.8%	22.2%	0.0%	16.7%	15.0%
5001-7000	0.0%	16.7%	5.6%	11.1%	16.7%	10.0%
7001-10000	5.6%	5.6%	11.1%	5.6%	8.3%	7.2%
10001-15000	11.1%	5.6%	2.8%	2.8%	11.1%	6.7%
15001-20000	2.8%	2.8%	2.8%	5.6%	2.8%	3.3%
20001-30000	11.1%	5.6%	0.0%	8.3%	2.8%	5.6%



Income bands	Juba (N=26)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
30001-60000	11.1%	2.8%	5.6%	5.6%	2.8%	5.6%
Above 60000	2.8%	0.0%	2.8%	0.0%	2.8%	1.7%
Refuse to answer	0.0%	13.9%	0.0%	33.3%	0.0%	9.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Juba had a quarter of youth with low income households which earned well below 1000 SSP in the last month. Overall, the HH income peaked for most locations at the 1001-3000 SSD income band. In Fangak, there was an additional peak at the 3001-5000 SSP level reported by little over a quarter of the Fangak sample. The non-response rate was present but low, at 13.9% (N=5). In Wau and Bor, the income was similarly distributed although Wau had a high non-response rate as one in six respondents in Wau refused to reveal their household income in the previous month. The figure below demonstrates the income trends for each location.<sup>150</sup>

Figure 29: Youth Household Income Trends



### 2.3.2. Internet Utilization

Internet utilization was quite high amongst youth in Juba only and low in other locations. Among those who do use internet, there was a significant gender disparity as 42.5% (N=45) of all young men reported using internet compared to 13.5% (N=10) of young women. Amongst those who do use internet, they do at least once a day in all locations except Fangak, where the frequency of internet use was lesser – either weekly or rarely. The following table demonstrates the different purposes for which youth reported using internet mapped against the frequency of use. Most youth are using the internet for social media, followed by browsing.

<sup>150</sup> This is a stacked line chart which aims to demonstrate income trends rather than income distribution. In stacked line charts, each trend line treats the previous trend line as its base line instead of using the horizontal axis to plot a data finding.

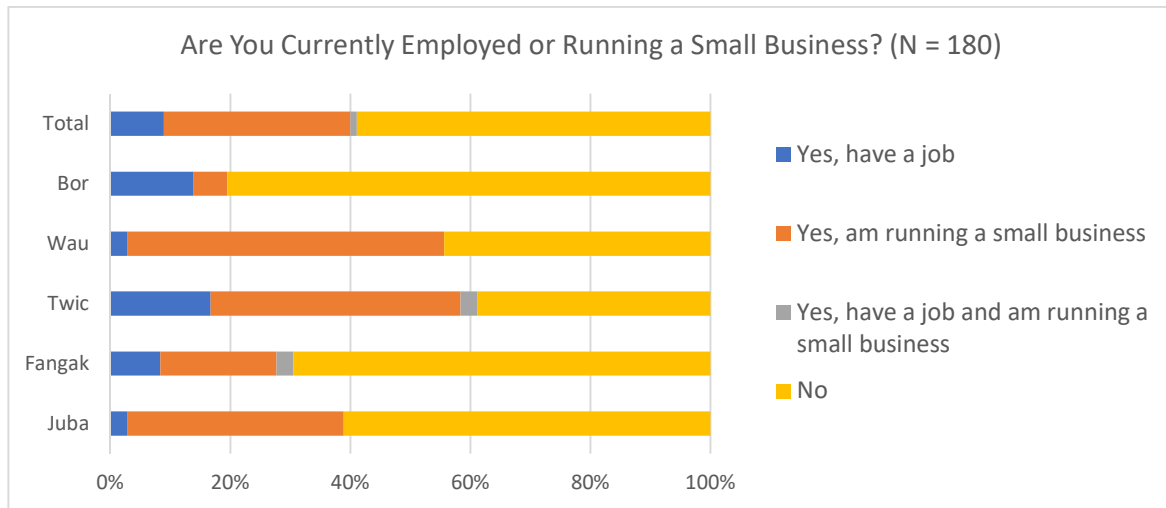
Table 24: Uses of Internet vs. Frequency of Internet Use

Uses of internet	Frequency of Internet Usage				Total
	At least once a day	At least once a week	At least once a month	Rarely	
Job search	30.6%	38.5%	100.0%	80.0%	38.2%
School work	19.4%	30.8%	100.0%	0.0%	21.8%
Browsing	38.9%	53.8%	100.0%	20.0%	41.8%
Music	13.9%	0.0%	0.0%	20.0%	10.9%
Searching for courses	38.9%	30.8%	100.0%	40.0%	38.2%
Online courses	11.1%	15.4%	0.0%	0.0%	10.9%
Social media	58.3%	92.3%	0.0%	100.0%	69.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Although youth are quite connected to the internet, a distinction must be made between their internet use and their computer literacy. The IOM study in Wau found that “very few respondents (11.0%, N=4085) reported having any computer skills,”<sup>151</sup> suggesting that internet usage may be on other platforms than the computer such as mobile phones.

### 2.3.3. Current Employment Status

Figure 30: Youth Current Employment Status



The unemployment rate was quite high across all the sampled locations. Bor, Fangak and Juba have the highest unemployment rates, while Twic has the least. Amongst those who are employed, most are running a small business except in Bor where a slightly higher proportion have a job rather than a business. Juba and Wau have the lowest proportion of people with a job, with the situation in the latter echoed in the FGDs in Wau PoC:

<sup>151</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

“In Wau town and Wau POC, youth are just found hanging around and passing time under trees.” – Wau POC, FGD, Female

FDG participants in Twic protested that they are unemployed as their parents do not trust them enough to give them cattle in order to start businesses on their own. This idea of youth being pushed aside by their elders was also mentioned in an FGD in Wau POC, where one participant stated that government sector jobs are occupied by old people who refuse to retire and make room for young, skilled workers.

While youth perceive discrimination against them in existing jobs and opportunities, they also recognise the insufficiency of the current job market itself.

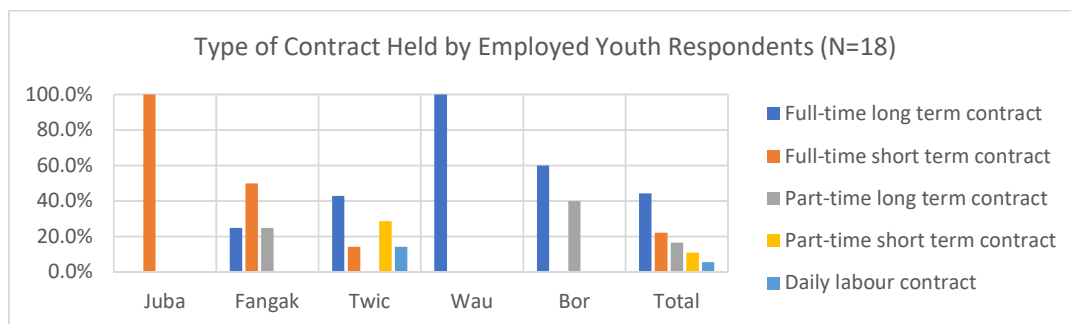
“Poor roads during the rainy season and poor network coverage within some parts in South Sudan make it difficult for investors to come for investments, hence a high rate of unemployment” – Wau POC, FGD, Male.

In a FGD in Fangak, a female participant remarked that most jobs are provided by NGOs and few other agencies exist that could provide employment. The unemployment rate of young women is slightly higher (66.2%, N=49) compared to young men (53.7%, N=57). This is attributed to men not allowing their wives to seek employment and to the lower education rate among women, which makes them less competitive candidates in the job market. The distribution of job status amongst young men and women who are employed is similar with around two thirds (equal gender distribution) running a small business. The remaining one third of youth have a job, minus two individual male youth claiming to be handling both a job and a business.

Pibor also exhibits high youth unemployment. As reported by members of the Ministry of General Education and Instruction in Boma State, there are many youth who have dropped out of school, especially former child soldiers, who are all without work and roam in the market.<sup>152</sup>

Current Domain of Work and Type of Contract Held by Employed Youth

Figure 31: Type of Contract Held by Employed Youth Respondent



Juba youth work across several domains mostly in business management and agriculture, while between one and three youth work in teaching, mobile charging service, office administration, retail or computer/ICT. All of Juba youth who are employed are on full-time short-term contracts. Young male FGD participants in Juba PoC said that most jobs found by men are in the humanitarian sectors in the

<sup>152</sup> Finn Church Aid. (2018). *Bor and Pibor Assessment Report*.

field and in running their own business transporting goods from abroad. A handful of women are working in the humanitarian sector as well but are limited to office work while most other urban women are engaged in small businesses like selling vegetables, fruits and milk. In rural Juba, the majority of female FGD participants said that they are self-employed, having their own businesses such as making madazi, tamia, alcohol and tea among other goods. A few said that they have been employed in a firm to dig and remove weeds.

Fangak youth reported currently working in agriculture while the rest (1 to 3 youth) work in either arts and crafts, business management, catering, construction, dairy farming, livestock management, tailoring or at an NGO. Most Fangak youth have full-time short-term contracts, while a handful have full-time (e.g., business management) and part-time (e.g., livestock management) long-term contracts.

“Young girls [in Fangak] sell hand decorated bed sheets. This idea has been there since times back. They buy plain bed sheets and draw shapes on it then they stitch coloured strings on the drawings manually. This type of business is seasonal, customers are not constant. In one year someone can sell like four or five bed sheets only.” – Fangak, FGD, Female

In Twic, most youth are engaged in agriculture or arts and crafts while a few (1 to 3 youth) work in animal healthcare, hairdressing, business management, carpentry, computers/ICT, dairy farming and construction. Most have full-time long-term contracts, while a handful have part-time short-term contracts (e.g., livestock management and welding).

In Wau, several reported that they are engaged in business management and a few others (1 to 3 youth) were scattered across the domains of agriculture, hairdressing, marketing, electronics (repair, installation), healthcare, mobile charging service, boda mechanic and tailoring. Wau youth who are employed mostly reported being on full-time long-term contracts (mainly those working in business). As per the IOM study, “The majority of youth respondents reported doing casual work, primarily in order to pay their school fees and also to contribute towards their food and living requirements. Other income-generating activities reported by youth were fishing, cleaning houses and selling goods in the market such as charcoal, street foods and petrol. Of these, cleaning houses was reported to be the most lucrative.”<sup>153</sup>

In Bor, a majority of youth (14 out of 36) work in subsistence agriculture, and between 1 to 3 youth work in either finance, carpentry, dairy farming, livestock management or masonry. From the youth with contracts (N=5), 60% are on full-time long-term contracts, while the remaining 40% have part-time long-term contracts (e.g., finance).

Most women are engaged in agriculture (mainly subsistence followed by ox-plough agriculture). A few are engaged in hairdressing and small business management. Additionally, there are some sole cases of women working in the finance, catering, computer/ICT, dairy farming, healthcare, hospitality, tailoring and other sectors. The sample of employed women who reported their type of contract was very small (N=5) and, thus, no meaningful trends regarding contractual types based on gender could be assessed.

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<sup>153</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

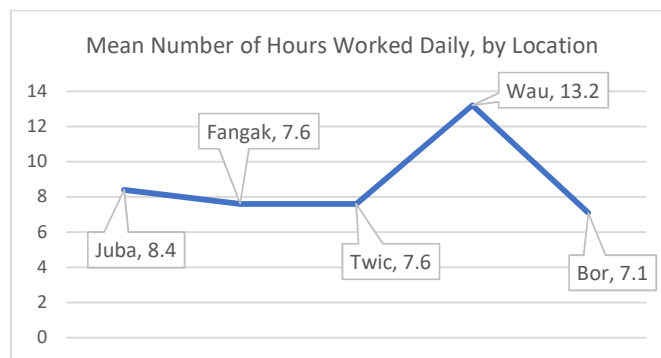
An NGO coordinating body representative in Duk indicated that work for youth is seasonal: during the summer (December-April), most youth are involved in employment and livelihood activities. In the rainy season, however, many youth participate in farming activities.<sup>154</sup> The specific trades are typically livestock trade, teaching in primary schools, small business owners selling soap, sugar and salt, boda boda drivers, fishing and producing charcoal. Men farm during the rainy season and hunt/trade/sell goods in the dry season, while women generally are unemployed (working at home) or work in salons, restaurants and other similar small businesses.<sup>155</sup>

### Volume of Work Performed by Youth

A majority (32.7%, N=24) of youth who are employed reported working seven days a week. These youth mainly operate businesses or work in the trades of barber/hairdressing, appliance repair, healthcare, hospitality, leather work, tailoring and mobile charging services. A significant proportion (22.2%, N=17) of employed youth work six days a week, and most are engaged in various types of agricultural activities (mechanised, ox plough and manual). Another 22.2% (N=17) work five days a week in agriculture, animal healthcare, finance and dairy farming. A few youth (18.3%, N=14) work three days or fewer in a week and engage in subsistence agriculture, small businesses and livestock selling/herding.

On average, youth work around seven hours a day in Fangak, Twic and Bor followed by eight hours a day in Juba and thirteen hours a day in Wau. Youth working in skilled jobs work between seven to nine hours, while those working as unskilled labourers tend to work more around ten to thirteen hours a day. As reported in IOM in Wau, “The majority of male youth respondents interviewed reported engaging in casual work at weekends and during school holidays, however the majority of female youth respondents interviewed did not engage in any income generating activities. This was partly due to time constraints as they spent their weekends tending to household duties. The lack of jobs suitable for women to work in was also identified as a problem as many of the jobs available in construction are not perceived as female friendly activities.”<sup>156</sup>

Figure 32: Distribution of Mean Number of Hours Worked by Youth



<sup>154</sup> KII with Livelihoods representative Duk County 28 March 2017

<sup>155</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

<sup>156</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

#### 2.3.4. Current Economic Status

##### Current Income and Savings

Most youth in Juba, Wau and Bor said they receive payments on an ad-hoc basis as they are self-employed, while a majority of youth in Fangak receive wages on a daily basis and in Bor youth receive a fixed salary monthly.

Most employed youth are earning well over 100 SSP per hour in all locations except Fangak. Youth in Fangak earn much lower hourly wages with nearly half the sample earning 0-25 SSP per hour. There are no significant differences between income earned by male and female youth.

A majority of youth in Juba, Twic and Wau said they are able to save “some” of their earnings, while a majority in Fangak said they save “most” of their earnings. Thus, given the low hourly wage and high ability to save from income reported by youth in Fangak, it may be that the cost of living in Fangak is lower than other location or Fangak youth come from multi-breadwinner households.

Only half of employed youth (50%, N=7) in Juba actually confirmed having saved some of their income, and most keep their savings in a bank. In Twic and Wau, 86.3% (N=19) and 60% (N=12) of employed youth confirmed having savings and keeping their savings at home, respectively. Fangak has three youth and Bor has one youth who said they saved. In Fangak, the youth keep the money at home while in Bor, the youth use a savings association. However, besides earnings from their job or business, a quarter of Juba and Wau youth also receive money from friends or family, while nearly half of the youth in Bor also receive remittances.

##### Expenditures

The survey was not designed to record the expenditure amounts of youth. However, it did include questions about the items which young people bought. Food, healthcare or medicines, charcoal and soap were the commodities which youth reported consuming most of their expenditures across all locations.

This is supported by secondary data at least for Bor. Further, the Bor Food Security Cluster (FSC) provided details about the breakdown of expenditure on food and found that 60% of household income was spent on cereal while 10% was spent on oil, 9% on meat and 8% on pulses (such as beans, lentils, peas, etc.).<sup>157</sup>

#### 2.3.5. Experience with VTs

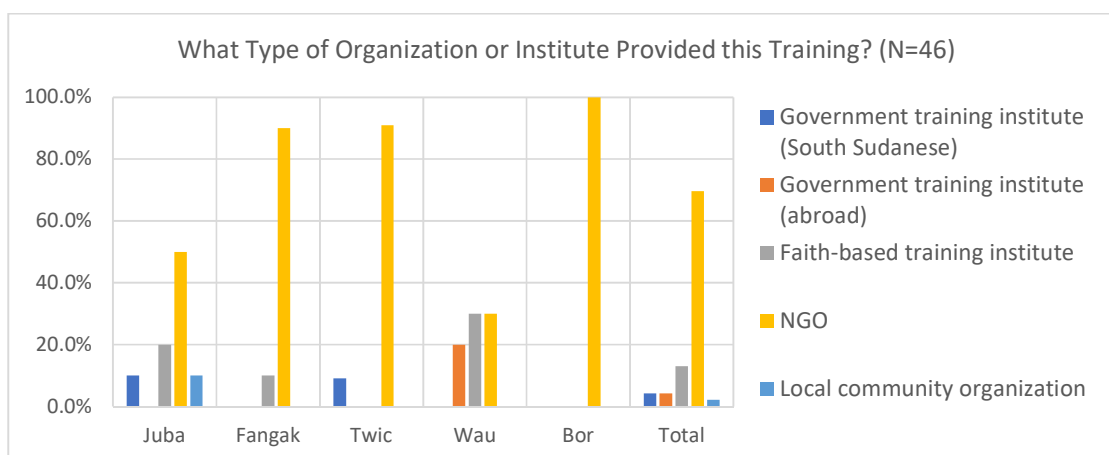
##### Prevalence of Vocationally Trained Youth

Approximately a quarter of youth in every location (a total of 46 out of 180) except Bor have received vocational training (VT) in the past. In Bor, the prevalence of VT recipients is extremely low with only 13.9% (N=5) of youth having attended VT. The gender distribution of VT recipients varies across locations although NGOs are the top provider of VT trainings in all locations except Wau.

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<sup>157</sup> FAO, WFP and NBS. (2017). *Bor Urban Food Security and Nutrition Assessment Report*.

Figure 33: Providers of VTs to Youth



In Juba and Twic, more women had received vocational trainings as 60% (N=6) and 63.6% (N=7) of VT recipients in each location were female. In Juba, Don Bosco VTC, Juba City Training Centre, Ministry of Finance, Red Crescent, SMECOSS, Safe Lives Initiative, South Sudan Red Cross, UNDO, UNICEF, ADRA, WHO and YMCA were reported as the training providers. While a majority of VT recipients found their VT to be useful for their current job, 40% (N=4) of Juba VT recipients did not find it useful at all.

In Fangak, the gender breakdown was equal amongst VT recipients. VT recipients stated that they had received VTs from ACOM, Christian Network, FCA, FH, IMA, NRC and Nile Hope organisations. All VT recipients said they found their training to be very useful in their current job. However, both male and female FGD participants in old Fangak were not aware of training providers other than the Catholic Church.

In Wau, all 10 VT recipients were male, most of whom received VTs from NGOs and faith-based institutes in equal measure. Don Bosco VTC, Dorcas, FAO, FCR and IOM were reported to have provided trainings to Wau VT recipients. A significant majority (60%, N=6) found their training experience to be not at all useful in their current job. In the IOM study, only 19.8% of the sample had received any form of vocational training in the past. All youth interviewed who had received vocational training indicated that it was a positive experience and useful for them.<sup>158</sup>

In Twic, most youth (N=9) reported having received VT from NRC while one was trained by the MoGEI and another by the Red Cross. They all found their VT experience to be somewhat or very useful in their current job. Urban female FGD participants added that candidates for the TVET/VT/skills development trainings were selected by the chiefs and NRC and focused on members of the most vulnerable groups.

In Bor, all but one of VT recipient were male and all VT recipients had received VTs from the NGO CRS alone. All respondents found the learning from the VT to be very useful for their current job. In terms of domain, the trainings that young people reported having received varied across all locations and are presented in Table 25. Life skills, agriculture, mechanic, computers/ICT and human healthcare were

<sup>158</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

reported in more than one location. In Juba, Fangak and Twic, the majority received training in English while in Wau and Bor, 60% of youth received training in Arabic.

Table 25: Types of Vocational Trainings Received by Youth, by Location

Juba	Fangak	Twic	Wau	Bor
<b>Computers/ICT</b>	<b>Agriculture</b>	<b>Arts/Craft</b>	<b>Agriculture</b>	<b>Carpentry</b>
<b>Construction</b>	Animal healthcare	Hairdressing	Blacksmith	Life skills
<b>Systems</b>	<b>Human healthcare</b>	<b>Marketing</b>	<b>Entrepreneurship</b>	<b>Masonry</b>
<b>installation</b>	Catering	Human	Marketing	
<b>Life skills</b>	<b>Dobbi</b>	healthcare	<b>Computers/ICT</b>	
<b>Cycle mechanic</b>	Life skills	<b>English</b>	Appliance repair	
<b>Demining</b>	<b>Livestock mgmt.</b>	Life skills	<b>Generator repair</b>	
	Mobile charging	<b>Auto mechanic</b>	Leather work	
	service		<b>Livestock mgmt.</b>	
	<b>Counselling</b>		Mechanic (auto, cycle, boda)	
			<b>Poultry farming</b>	
			Plumbing	

Training for technical and vocational knowledge is relatively scarce in the three Jonglei locations with 77% of consumer demand survey respondents indicating that they have never received any TVET/VT/skills development. A total of 26% of residents in Twic East and Pibor report having received vocational and/or skills training, and only ten percent of Duk residents indicated the same.<sup>159</sup> Of the 36 respondents that had received training, 42% had received training in mechanised agricultural practices, 31% had training in manual agricultural practices, and 22% had training on using ox ploughs.<sup>160</sup>

All respondents indicated that they were most likely to be trained in agricultural practices and animal healthcare. KII participants said that training must focus on farming activities (tractor operation and ox plough skills), improving produce quality, fishing skills and animal husbandry skills (veterinary skills). Additionally, respondents suggest training in customer service/care, business management, and hygiene for people selling food in markets.<sup>161 162</sup>

Of the 30 qualitative interviews completed for the CARE International study, only two respondents indicated that any vocational skill training had actually taken place. An NGO coordinator in Pibor said that Fin Church Aid and Intersos had completed training on increasing youth wages and female empowerment, respectively. Additionally, a producer in Duk stated that CRS had held an agricultural training two years ago, but that the NGO had since left the area.<sup>163</sup>

<sup>159</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

<sup>160</sup> *Ibid.*

<sup>161</sup> KII with Vendor Duk County 31 March 2017; KII with Vendor Twic East 25 March 2017; KII with Vendor Pibor 30 March 2017.

<sup>162</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

<sup>163</sup> KII with Local Coordinating NGO Body representative Pibor county, 4 April 2017; KII with Producer Duk County 31 March 2017



### Expenditure Towards VTs

Only a quarter of the overall youth sample did not incur any cost for attending a VT programme. However, the trends regarding different costs incurred differed across locations. In Juba, half of VT recipients paid for transport while 30% (N=3) paid for food. In Fangak, half of the VT recipients did not incur any costs, while the rest has some expense, in the form of food (N=1), stationary (N=1), tools (N=1) and inputs (N=2) for using during training. The training provided by the Catholic Church was free.

“[The Catholic Church] only asked us to be disciplined and respectful” – Fangak, FGD, Male

In Twic, the majority of VT recipients did incur expenses in the form of food (N=3) and inputs (N=3) followed by stationary (N=2), while one person had paid for tools to use during the training. In Wau, 40% (N=4) of VT recipients did not incur expenses although a few others paid a tuition fee (N=2) in addition to transport (N=1) and food (N=2) to access the training.

### Barriers or Risks to Entry and Completion of VT

The training completion rate reported by VT recipients was overall very high. Only one VT recipient each in Fangak and Twic, and two VT recipients from Wau reported not completing their VTs. Youth were asked about the barriers they face when attending the VT which may prevent them from entering or completing a VT programme. One in five VT recipients reported struggling with discouragement from friends and family to complete the training stemming from their lack of awareness about the usefulness of VTs. This was reported in all locations except Wau. Threats and harassment from youth outside TVET/VT/skills development centre were also reported by a few VT recipients from Fangak, Twic and Bor. No gender specific trends were seen although a BBC Media Action study did find that female trainees may drop out when they get married. Additional reasons for dropouts identified in the BBC Media Action study include the problems posed by lack of English language skills when the medium of TVET/VT/skills development instruction is English, the poor classroom dynamics when the gap in educational backgrounds of trainees is large and the negative impact on trainee motivation due lack of training material or infrastructure.<sup>164</sup>

In Juba, most recounted issues such as inability to afford the training tuition, power problems and lack of seriousness of instructors as strong challenges faced when they attended the VT.

“Due to the insecurity in Juba, many people are scared to process their nationality... [and so] they don’t have basic documents to get some jobs which are meant for the citizens of South Sudan.” - Juba POC, FGD, Male

In urban Juba, female FGD participants stated that “they are the ones paying their own tuition fees.” They added that transportation to and from school is also a consideration with one stating it cost her 1,500 SSP a week. Lastly, all participants said that it reflects 30% of their income. The male FGD participants similarly state they were paying 2500 SSP as tuition fees every year, transportation costs, two reams of printing paper a year, safety boots and food throughout the years they spent for TVET/VT/skills development. Lastly, all participants said that it reflects 80% of their income. Data from secondary reports also add, “Responsibilities in the home, social attitudes towards girls’ education and

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<sup>164</sup> BBC Media Action. (2018). *Behaviour and Perceptions Market Study*.

the widespread practice of early marriage all act as barriers to girls receiving an education.”<sup>165</sup> There also seems to be an added risk of dropout amongst women as “girls who do remain in school or return to school after marriage often drop out once pregnant and find it difficult to return after giving birth. Apart from the responsibilities and challenges of childcare, girls find it difficult to return to school due to social stigma attached to school girls with children.”<sup>166</sup>

In Bor, language comprehension was reportedly a barrier as entrance interviews are conducted in English.

“Those who do not know English find it hard because during interviews everything is in English.” – Bor, FGD, Rural Female

Documentation and secondary school completion are also a barrier in Bor as per the following response.

“It is difficult to get into TVET programme because they require so many things like a high school certificate which they consider to be added advantage to be admitted.” – Bor, FGD, Rural Male.

In Wau, the biggest challenge faced by every other VT recipient was insecurity and violence due to conflict. Wau recipients were IDPs and reported facing discrimination by trainers and missing/lost documentation as other barriers.

The youth whom did not receive any VTs previously were also asked what had prevented them from doing so. A majority of youth in all locations, except Wau, said this was due to a lack of availability of training opportunities. In Wau, the problem appears to be linked more to the inability to afford trainings rather than availability of trainings. A few non-VT recipient youth in Juba, Twic, Wau and Bor also mentioned that trainings took place too far away from their homes. A couple of youth mentioned their ongoing university studies, risk of insecurity and home responsibilities as other barriers that keep them from attending a vocational training course. The full range of responses are presented in the table below.

Table 26: Barriers to Enter a Vocational Training Course Reported by Youth

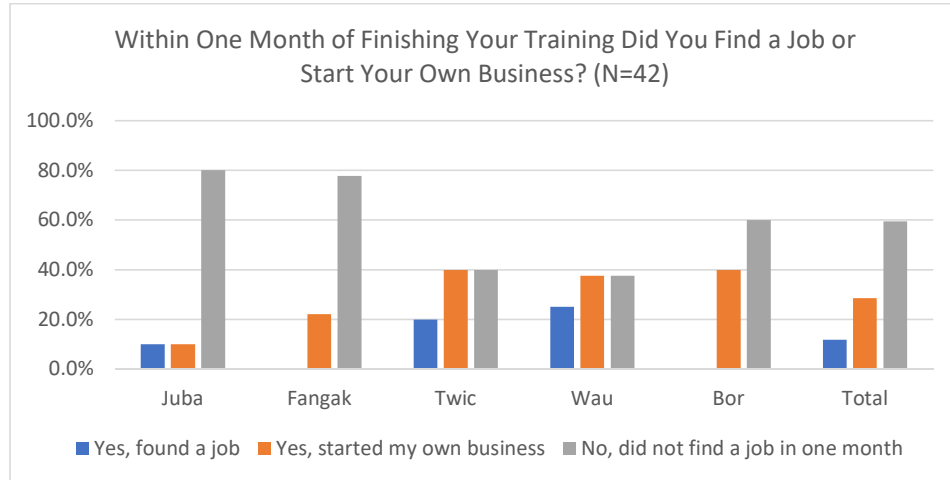
Factors	Juba (N=26)	Fangak (N=26)	Twic (N=25)	Wau (N=26)	Bor (N=31)	Total (N=134)
Not interested	7.7%	3.8%	12.0%	11.5%	6.5%	8.2%
No trainings available	50.0%	84.6%	72.0%	15.4%	51.6%	54.5%
Can't afford trainings	23.1%	3.8%	0.0%	42.3%	25.8%	19.4%
Trainings too far away	3.8%	0.0%	12.0%	15.4%	6.5%	7.5%
No room in training programmes	3.8%	3.8%	4.0%	3.8%	6.5%	4.5%
Other	7.7%	0.0%	0.0%	11.5%	3.2%	4.5%
Don't know	3.8%	3.8%	0.0%	0.0%	0.0%	1.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

<sup>165</sup> Women’s Refugee Council. (2010). *Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan*.

<sup>166</sup> *Ibid*.

## Post VT Employment Experience

Figure 34: Employment Rate within One Month of VT Graduation



The overall rate of those who find employment within one month of VT graduation was not high and was especially low in Juba, Fangak and Bor. Very few people found jobs (11.9%, N=5); a few more mostly started their own business (28.5%, N=12) while the vast majority remained unemployed.

*“We have many causes of unemployment. First of all there is high job competition because many youths are educated compared to the few jobs around so people compete for the few jobs available.” – Bor, FGD, Rural Female*

Main reasons given by those who did not find employment within one month of VT graduation were lack of jobs and/or no capital to start their own business. A minority (8%, N=2) also mentioned that they felt they had not tried hard enough, while some standalone cases mentioned issues of security, lack of a response from NGO recruiters and lack of a national certificate as their barriers.

FGD participants mentioned that the TVET/VT/skills development centre did not promise them any employment and it only collected their contacts and promised to inform them about employment opportunities like job advertisements. They added that the TVET/VT/skills development centre did not help them look for employment, but it showed them how to write a CV, application letter and how to present themselves during an interview. Male FGD participants stated that there are no direct employment opportunities, but the TVET/VT/skills development centre connected them to some companies who offered them limited three months’ internship training opportunities.

Beyond the initial one-month post VT graduation, youth in general were also asked about other barriers they may face which prevent them from working in their domain of training. Similarly, most youth in all locations highlighted the problem of lack of jobs as the main barrier. In Twic and Bor, however, youth also reported that they found the work in their domain of choice to be very difficult and the youth were engaged in agriculture, marketing, carpentry, blacksmith services, healthcare, Boda mechanic and livestock herding.

“Potential employers are not after the certificate the [candidates] have obtained but who they know. The reason of attending TVET training is to establish our own business no matter how long will it take. [Employers] know in their hearts that we now know better than before but still treat us the same.” – Twic rural, FGD, Male

Some also reported the problem of low pay with some domains such as hairdressing, dobbi, appliance repair, bicycle mechanic, plumbing and mobile charging services, despite gaining respect for having completed the training. Women FGD participants in Twic affirmed the fact that they were treated with more respect than before once they undertook a vocational training.

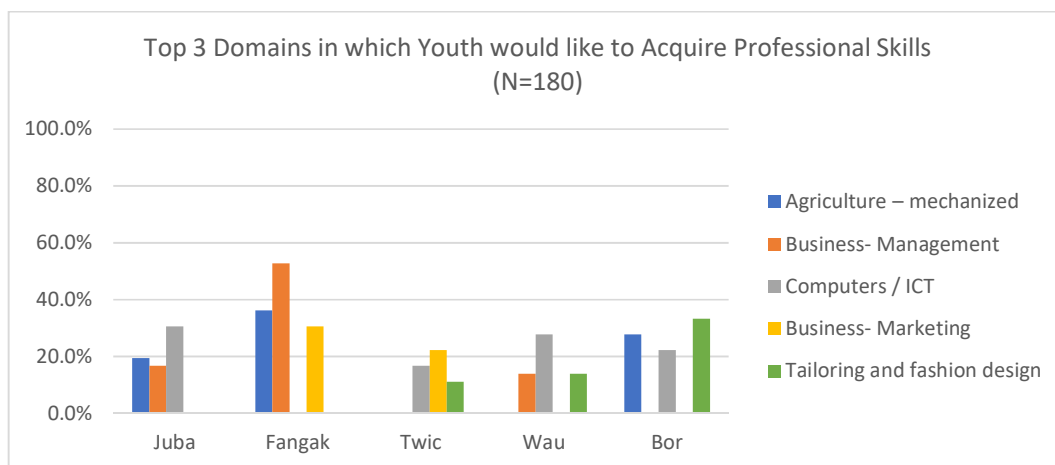
Some respondents quoted other barriers such as lack of documentation, skills, tools and funds. Youth women FGD participants said they felt their skills and knowledge acquired at the VTC were undermined when looking for jobs or starting businesses because of a lack of tools. Although tools are addressed during training, they are not given out to the graduates for use after graduation.

#### Professional Skills and Infrastructural Provisions Desired by Youth

When youth mentioned a lack of skills as a barrier to accessing employment, they were asked about the types of skills they feel they require. This was a small cross-section of the overall youth sample (N=25) so it is difficult to identify any location-specific trends, but overall, most desire technical skills (64%, N=16), followed by soft skills (44%, N=11) and computer/ICT skills (40%, N=10). In Bor, youth indicated their desire to acquire literacy (54.5%, N=6) and accounting skills (36.3%, N=4) as well.

In terms of the skill domain, all youth were asked which domain they would like to develop their professional skills. These responses somewhat correspond to the skill families described above. Computer/ICT skills were observed to be common amongst the top three choices in all locations except Fangak. Business management, agriculture and tailoring were also amongst the top choices in more than two locations.

Figure 35: Top 3 Domains of Choice for Youth to Acquire Professional Skills



There were also some preferences related to language of instruction. While respondents Juba and Twic exhibited a high preference for English, a large section of Wau VT recipients clearly prefer Arabic. This is supported by the IOM study finding that the majority of youth in Wau do not speak English, and this

language is a barrier to finding employment.<sup>167</sup> In Bor, many would prefer trainings in Dinka while in Fangak, some would like trainings in Nuer.

In order to understand the ways in which vocational trainings centres (VTC) can better meet the needs and expectations of youth, young people in the survey were asked about the type of additional services they desired to have at a VTC. Childcare was amongst the top choices across locations.

In Juba, many wanted other facilities such as a computer lab and English courses. Urban male FGD participants said that air conditioning and refrigeration are very important skills that a professional mechanic should know. Respondents claim that it is marketable and easy to learn even for primary school dropouts. They added that having this particular skill can lead to self-employment because it is in high demand in South Sudan, and that vehicles, hotels, and offices, all cannot do without air conditioning. Human Aid Action and partners also consulted youth in Juba PoC for their desired activities with the following findings: “Some of the activities suggested by the members of the IDP Youth Forum are: training in vocation skills (especially in industrial skills for immediate employment or job-creation); games and sports, training in peaceful co-existence focusing on managing inter-group conflicts and on designing innovative social cohesion activities (that not only bring people together to socialize but also to heal trauma); establishment of community libraries, training in computer skills, training in art and craft for both out-of-school and in-school youth (most especially for girls).”<sup>168</sup>

In Fangak, 80% (N=8) of VT recipients said they would appreciate the availability of medical assistance, including consultations, a pharmacy or medicines. Additional sewing machines were also requested, as female FGD respondents mentioned that in the tailoring training, “three students were sharing one sewing machine which was old. If they can bring more and new machines where each trainee will work with one machine it will be helpful.”

In Twic, psychological counselling services and a pharmacy were the top choices after childcare. In Wau, the trend was slightly different as most wanted a shop to be able to buy tools and inputs, followed by a pharmacy. In Bor, 4 out of 5 VT recipients wanted a shop selling tools and inputs to be available on campus, while 3 out of 5 wanted a pharmacy. The table below summarizes the facilities youth wish to have.

Table 27: Type of Facilities Desired at TVET/VT/Skills Development Centre

Facilities	Juba (N=10)	Fangak (N=10)	Twic (N=11)	Wau (N=10)	Bor (N=5)	Total (N=46)
Childcare	40%	50%	36,36%	0%	20%	30%
Sports & recreation	30%	40%	18,18%	20%	20%	26%
Arts and Crafts	10%	10%	18,18%	10%	20%	13%
Canteen or cafeteria	30%	20%	18,18%	10%	0%	17%
Psychological counselling	0%	30%	27,27%	10%	20%	17%

<sup>167</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

<sup>168</sup> Organizing People for Prosperity, Human Aid Action. (2018). *A Quick Assessment of Needs of Youth in the Protection of Civilians Camp One - Juba One PoC*.

Facilities	Juba (N=10)	Fangak (N=10)	Twic (N=11)	Wau (N=10)	Bor (N=5)	Total (N=46)
Medical consultation	30%	80%	9,09%	10%	40%	33%
Pharmacy or medicine	10%	40%	27,27%	30%	60%	30%
Shop to buy tools and inputs	10%	20%	9,09%	40%	80%	26%
Shop for food and non-food items	20%	30%	0%	20%	20%	17%
Shop for stationary items	10%	10%	9,09%	30%	20%	15%

### 2.3.6. Barriers or Challenges for Job Hunt or Business Setup

The level of unemployment in the youth sample was quite high. Thus, the challenges related to accessing jobs or setting up businesses experienced by youth were investigated in detail. Similar to challenges faced by VT recipient youth, across all locations the youth sample indicated the main reason behind their unemployment status is a lack of jobs and lack of capital to start their own businesses. A smaller proportion of youth in Fangak (32%, N=8) and Bor (37.9%, N=11) also felt their lack of skills contributes to their inability to find a job or set up a business.

Youth were also asked about any barriers or risks they may face when they are in the process of actively seeking employment. High competition, lack of jobs, nepotism and discrimination due to tribal affiliation were the major challenges reportedly faced by youth respondents and supported by youth FGD participants across locations.

“Nepotism is also a challenge whereby the boss employs his relative so if you happen not to be a relative to any of the employers, you end up not getting employed.” – Bor, FGD, Rural Female

A BBC Media Action nationwide study on youth also confirmed that youth in general find the job market to be characterised by high competition over office jobs, valued networks and the preference to hire foreigners (mainly from other East African countries).<sup>169</sup> The IOM study respondents said that the biggest barrier when wishing to set up a business is a lack of capital.<sup>170</sup>

The table below provides youth’s responses by location and also indicates other barriers youth are facing when trying to access employment.

Table 28: Barriers or Risks Faced when Looking for Employment

Type of barriers and risks	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Nepotism	30.6%	5.6%	25%	36.1%	47.2%	28.9%
Request for sexual favours	11.1%	0%	0%	8.3%	0%	3.9%
Request for financial favours (ex. Paying a bribe)	11.1%	5.6%	22.2%	8.3%	2.8%	10%
High competition	30.6%	50%	44.4%	33.3%	30.6%	37.8%

<sup>169</sup> BBC Media Action. (2018). *Behaviour and Perceptions Market Study*.

<sup>170</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com).

Type of barriers and risks	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Low wages	0%	8.3%	11.1%	13.9%	11.1%	8.9%
Lack of jobs	30.6%	50%	22.2%	16.7%	36.1%	31.1%
Lack of awareness about job platforms	22.2%	16.7%	8.3%	8.3%	5.6%	12.2%
Lack of job platforms	2.8%	19.4%	16.6%	8.3%	5.6%	10.6%
Discrimination due to gender	2.8%	2.8%	0%	13.9%	2.8%	4.4%
Discrimination due to tribal affiliation	44.4%	5.6%	5.5%	41.7%	16.7%	22.8%
Discrimination due to political affiliation	11.1%	2.8%	0%	19.4%	0%	6.7%
Discrimination due to age	0%	2.8%	0%	11.1%	2.8%	3.3%
Negative perception of the trade	8.3%	8.33%	5.6%	2.8%	0%	5%
Missing or lost documentation	5.6%	13.89%	11.1%	2.8%	25%	11.7%
No legal permission to work	2.8%	0%	0%	8.3%	2.8%	2.8%
Other (please specify)	27.8%	2.78%	2.8%	11.1%	2.8%	9.4%
Don't know	5.6%	2.78%	0%	2.8%	0%	2.2%

No significant barriers specific to women were observed in the quantitative data. However, in qualitative data, both male and female FGD respondents across all primary locations remarked that women may experience harassment and face requests for sexual favours before they are given jobs.

Other barriers mentioned by a few youth were price fluctuation, lack of customers, transport and printing costs and lack of electricity (important barrier for someone trying to maintain a mobile charging service).

In Juba PoC, most of the female FGD participants said they do not have the skills to compete with other candidates while searching for jobs. Youth who have studied at some universities in Juba or studied abroad are seen as preferable by most employers.

In rural Juba, the majority of the male FGD participants said the major obstacle is language because most of the NGOs need people who can speak and write well in English. However, most studied in Arabic, which makes it difficult for them to get work.

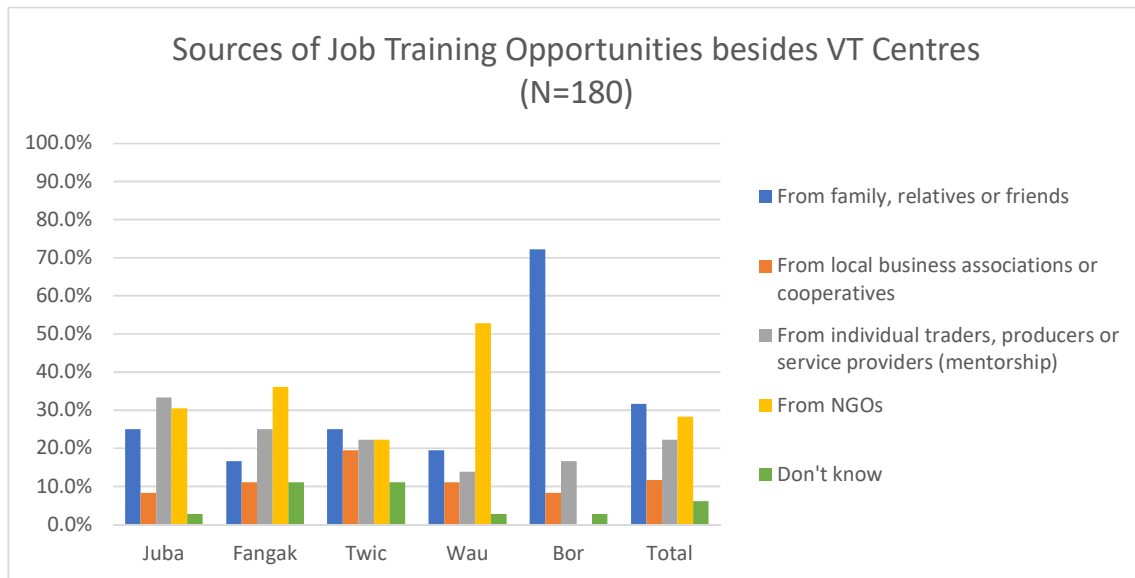
In terms of job preparedness, very few youth (6.1%, N=11) said they received career counselling from an NGO. Career counselling was reportedly provided by Uganda Christian University in Juba, by FCA, FH, IMA, Morning Start and Nile Hope in Fangak, by NRC in Twic and by Friends and IOM in Wau.

Both male and female FGD participants in Bor remarked on the high cost for printing and photocopying application materials in order to apply for jobs. Also, no youth from Bor confirmed having received career counselling. Another pan-country youth-focused study by BBC Media Action indicates that career guidance remains a pressing challenge for young people in South Sudan including on how to find employment and, if they opt for self-employment, how to find funds to start a business.<sup>171</sup>

<sup>171</sup> BBC Media Action. (2018). *Behaviour and Perceptions Market Study*.

### 2.3.7. Prevalence and awareness of alternative training opportunities

Figure 36: Sources of Job Training Opportunities besides VT Centres



Most youth in all locations except Twic were aware about the possibility of being trained in skills by a family member, relative or friends. Many consider NGOs to be training providers as well. Awareness about mentorship opportunities was not very high although it was higher in Juba than other locations.

This trend is also found among the vast majority of youth who reported never having undertaken a mentorship or apprenticeship. A minority of respondents (17.2%, N=31), mostly coming from Wau, Twic and Juba, said they have undertaken mentorships or apprenticeships in the past. The vast majority who have never done so mentioned the main problem to be a lack of mentorship and apprenticeship opportunities (71.1%, N=106) followed by a lack of personal connections (30.2%, N=45) which could help them obtain such opportunities. Youth from Fangak specifically reported that mentorships are perceived poorly in their community. Only 11.4% (N=17) of the youth sample overall said they had tried but failed the recruitment process. Full detailed findings are given in Table 29.



Table 29: Reasons for not Undertaking Mentorship Reported by Youth

Reasons	Juba (N=31)	Fangak (N=33)	Twic (N=26)	Wau (N=25)	Bor (N=34)	Total (N=149)
No need	6.45%	0.0%	7.69%	8%	2.9%	4.7%
No opportunities	70.97%	69.70%	80.77%	80%	58.8%	71.1%
No personal connections	35.48%	39.39%	19.23%	16%	35.2%	30.2%
Low trust in youth by local businesses	3.23%	6.06%	7.69%	4%	0.0%	4.0%
Poor perception of mentorship	9.68%	24.24%	0.0%	12%	0.0%	9.40%
Mentorship is not effective or useful	6.45%	3.03%	3.85%	0.0%	11.7%	5.37%
Low or no wage	16.13%	0.0%	0.0%	0.0%	0.0%	3.36%
Not permitted by my family	6.45%	3.03%	0.0%	12%	0.0%	4.03%
Tried but failed recruitment	22.58%	18.18%	0.0%	16%	0.0%	11.41%
Too far	3.23%	9.09%	3.85%	12%	0.0%	5.37%
No transport	6.45%	3.03%	0.0%	0%	2.9%	2.68%
Don't have tools	3.23%	0.0%	0.0%	4%	0.0%	1.34%
Other	12.90%	3.03%	0.0%	12%	2.9%	6.04%
Don't know	6.45%	0.0%	0.0%	0.0%	0.0%	1.34%

Other factors mentioned by youth were a lack of time due to existing educational commitments, insecurity and home responsibilities. In an urban female FGD in Bor, respondents said that those who do not know English, the disabled, the young, and pregnant mothers find it difficult to access trainings.

Relatedly, youth were also asked if they are aware of establishments offering skills training courses. Around 38.9% (N=70) reported that they are aware of TVET/VT/skills development schools and 26.1% (N=47) know about technical schools. Several youth in Twic are aware of online platforms (30.6%, N=11). Awareness in general was the lowest in Wau with half of the Wau youth sample reporting that they do not know at all where they can seek skills training.

In rural Juba, a few of the male FGD participants said that they tried to do computer training at SMESSCOS, but did not succeed because of the high tuition fee for the training.

“People from a good (rich) background are able to access training whereas people from a poor background [find] it difficult to get training due to the current economic recession.” – Juba Rural, FGD, Male

In urban Juba, female FGD participants estimate that between 5-10% of youth have received trainings in catering, driving, tailoring, literacy and business management. Some have attended and completed housekeeping, nursing/first aid and business management courses successfully while the majority said that they are not able to access a TVET/VT/skills development centre.

### 2.3.8. Interest in VT Opportunities

A significant majority of youth are interested in receiving vocational trainings in all locations. In Wau, the prevalence of interested youth is slightly lower (70% in Wau as opposed to more than 90% in other locations). Most feel that a VT course could help improve their skills and help them obtain a job. A

handful also feel that a VT course could contribute to an increase in income and provide an opportunity to network. Very few think that a VT course could help them learn a trade, which suggests that youth perceive themselves as having an adequate skill base to build upon or that a VT course alone is insufficient perhaps due to a short period of training or poor quality instruction.

In the IOM study in Wau, male youth indicated they would like to receive training in agriculture, mechanics, electricity, building, carpentry and computer skills, and female youth identified baking, tailoring and other sewing-related activities, vegetable growing and computer skills as the most desirable trainings. Only agricultural activities and computer skills were perceived as being desirable skills for youth of both genders to learn. As all youth respondents were either currently in school or had previously attended school, literacy and numeracy were not felt to be skills in which they required training.<sup>172</sup>

Most youth were ready to undertake a month-long training course to acquire their desired skills. They were also very positive about the potential to land a job after such a training. A handful of those (N=23) who did not want to undertake a month-long training course cited their inability to afford the tuition and a lack of time. Secondary data indicates that young people see TVET/VT/skills development as empowering because it provides much-needed skills in the community and gives them a chance to earn money quickly and more regularly.<sup>173</sup>

In Fangak, male FGD participants are interested in basic computer training, IT training, water sanitation and hygiene training. In urban Juba, female FGD participants are interested in learning catering, basic computer knowledge, customer care and business management skills, and soft skills such as public and customer relation skills, management skills and an effective communication skill.

### 2.3.9. Trade Preferences of Youth

Trade preferences varied greatly across locations (a full list of preferred trades can be found in Annex 5 – Trades preferred by youth, by location). Youth were asked to identify the trades which could help anyone earn an income in their community and then asked about which trade was the ideal trade for themselves. Agriculture frequently featured as a preferred trade across all locations, while some other location-specific preferences are captured below. On the national level, the BBC Media Action study conducted across South Sudan found, “Among current and former [TVET/VT/skills development graduates], courses such as electrics, mechanics, carpentry, baking, hairdressing and tailoring remain popular because they are perceived to lead to lucrative careers. Selection of courses is also made based on interest.”<sup>174</sup>

Youth in general consider high salary, high availability of jobs, flexible hours, less stress and potential to enjoy the work as important factors in their ideal domain of work.

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<sup>172</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

<sup>173</sup> BBC Media Action. (2018). *Behaviour and Perceptions Market Study*.

<sup>174</sup> *Ibid.*

Table 30: Important Reasons for Selecting Ideal Domain of Work

Reasons	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Pays well	28.1%	26.5%	40.6%	19.4%	36.0%	29.9%
Enjoy the work	31.3%	23.5%	31.3%	19.4%	20.0%	25.3%
The work is easy to do	15.6%	23.5%	6.3%	32.3%	24.0%	20.1%
Many jobs available	9.4%	17.6%	12.5%	9.7%	8.0%	11.7%
Everyone does this trade	0.0%	0.0%	0.0%	6.5%	0.0%	1.3%
No one does this trade	0.0%	2.9%	3.1%	0.0%	0.0%	1.3%
Already have some knowledge	9.4%	5.9%	6.3%	9.7%	12.0%	8.4%
Other	6.3%	0.0%	0.0%	3.2%	0.0%	1.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Youth were also asked about trades most suited for women – hairdressing, beautician, agriculture and tailoring emerged to be amongst the top choices in all locations. Similar findings were found in another study conducted by BBC Media action about youth attitudes towards VTs, wherein male students seemed to suggest that courses such as baking and tailoring are suitable for women.<sup>175</sup>

Overall, a majority of young women (nearly 60%) interviewed in each location were ready to work in trades considered unsuitable for women<sup>176</sup> except in Wau where 75% said they would not work in such trades. Also, over half of youth in each location, including those with or without current employment, reported actively looking for other employment opportunities.

In Juba, most think one can earn an income by working as a barber, businessman or boda mechanic. However, considering factors such as the potential to provide a high salary and high availability of jobs, most youth feel trades such as office management, building and construction, computer/ICT and systems installations offer them the best employment opportunities locally. These jobs are also thought to incur low stress. Working as a dobbi was least preferred in Juba mainly due to the poor pay and high level of effort required.

In Fangak, most youth looked favourably at agriculture, both mechanised and subsistence, in addition to fish farming as possible means to earn a living in general in the community, as well as domains where they could be employed. High availability of jobs, low job requirements, high salary and flexible hours impacted their perception of good domains for employment. Despite the clear recognition of agriculture to provide a living in Fangak, one in five youth from Fangak do not want to work in subsistence agriculture because of poor pay, lack of knowledge and lack of possibility to actually enjoy the work. For women, subsistence agriculture in addition to hairdressing and beautician services is thought to be suited for women.

<sup>175</sup> *Ibid.*

<sup>176</sup> The study did not foresee capturing data on trades considered unsuitable for women, and only focused on the willingness of women to work in trades usually considered unsuitable for women.

In Twic, agriculture using ox-plough and marketing were top choices for youth in addition to carpentry as they are thought to offer a high salary, incur low stress and require less stringent entry requirements. Interestingly, a quarter of youth in Twic think women could work as auto mechanics as well.

In Wau, business, boda mechanic and barber or hairdressing are thought to be trades with potential to provide an income. However, far fewer youth thought boda mechanic could offer jobs in comparison to perceived high availability of jobs and flexible hours possible in hairdressing, food processing and agriculture. The majority of traders in Wau are male as there are only a limited number of trades which are perceived as being suitable for women (please note this study does not condone certain skills based on gender but rather state the perception of the respondents). These trades include the small scale sale of vegetables and fruit, tea shops, small restaurants (larger restaurants are almost always run by men), the sale of street foods and tailoring services.<sup>177</sup> In general, all youth expressed a desire to work, and many had hopes of gaining highly skilled employment as a doctor, mechanic or government worker. They also placed great importance on traditional education as well as a desire to receive vocational training.<sup>178</sup>

In Bor, subsistence agriculture, followed by beautician services and livestock management (herding/selling) are considered the best income generating trades. A majority of youth, however, think that tailoring offers the most employment opportunities for them locally mainly due to its potential to provide a high salary and work flexible hours. The Bor youth sample categorically singled out shoe repair and blacksmith services as the least preferred trades mainly because the work is perceived to be very difficult to perform. Male FGD respondents also demonstrated interest in driving courses and catering courses attributed to the perceived abundance of NGO cars, hotels, and restaurants.

Women are perceived to be able to work in a wider variety of domains than other locations. Women-friendly domains in Bor include hospitality services, nurse, food preparation, computers/ICT and dobby/dry cleaning. Most of the participants in the urban female FGD in Bor affirmed interest in learning tailoring above all other skills. Secondary data also suggests that “more women and children are working now compared to before the crisis. Due to the economic crisis, more burden of agricultural activities has shifted to women and girls. For an average household, 1.4 female members are involved in agricultural activities compared to one male member.”<sup>179</sup>

“Businesses that men can start include: money transfer business, transportation business, mobile charging, stone splitting and garage businesses. Women businesses include: selling of food items, cooking, charcoal sell, weaving and beautification, tailoring and craft-making businesses.” – Bor, FGD, Urban Female

Regarding the jobs that male and female youth want to engage in most, in the secondary locations studied it seems there is demand for more technical work. According to key informants, men are ready to engage in masonry, mechanical work, carpentry, house construction and tailoring, although they lack

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<sup>177</sup> Forcier Consulting and IOM. (2011). *Market Assessment for Youth Vocational Training Opportunities*. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

<sup>178</sup> *Ibid.*

<sup>179</sup> FAO, WFP and NBS. (2017). *Bor Urban Food Security and Nutrition Assessment Report*.

these skills. Women would like to expand their capacity in salon work, horticulture, tailoring and other small businesses.<sup>180</sup>

In Pibor, representatives of the Ministry of General Education and Instruction of Boma State stated that “trades such as [c]atering, [c]osmetology ([s]aloon), [c]arpentry, [t]ailoring and [e]lectronics are very important in the area to help the youth to be self-employed.”<sup>181</sup>

### 2.3.10. Existing Business Setup Trends

#### Access to Financial Institutions

Of the 175 youth who responded to the question on financial institutions, 36.6% (N=64) of them said that there are no financial institutions in their community to help with funding. The situation appears to be the worst in Bor, with 75% (N=27) of the respondents indicating the absence of financial institutions. In Fangak, Twic and Wau, approximately 35% youth said that they have access to business livelihood groups. In Fangak, 28.6% (N=10) respondents have access to informal money lending groups, and 27.8% (N=10) in Wau have access to savings and loan associations. Some respondents also mentioned that they borrow funds from their parents or friends. NGOs and microfinance institutions contribute very little to the funding. Further adding to the unavailability of start-up funding, in the places where funding did exist, 66.1% (N=78) respondents said it was not at all easy to access these funds; only 8.5% (N=10) said that they could easily acquire capital.

“Many people got very useful technical training but they cannot work because of lack of capital to start a business. – Fangak, FGD, Female.

In terms of perception of access, the three most common financial institutions perceived to be accessed by youth for business start-up funding were savings and loan associations, informal money lending groups and business livelihood groups. However, FGDs with women in Juba reveal that women face additional disadvantages due to the lack of ability to provide adequate collateral against what they view to be extremely restrictive loan eligibility requirements.

Table 31: Financial Institutions Perceived to be Accessed by Youth to Start Businesses

Financial institutions	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Banks	16.7%	0.0%	0.0%	5.6%	13.9%	7.2%
Microfinance	16.7%	19.4%	13.9%	13.9%	5.6%	13.9%
Business livelihood groups	11.1%	25.0%	33.3%	27.8%	16.7%	22.8%
Informal money lending groups	16.7%	55.6%	25.0%	2.8%	25.0%	25.0%
Savings and loan associations	30.6%	22.2%	38.9%	8.3%	44.4%	28.9%
NGOs	13.9%	13.9%	36.1%	8.3%	0.0%	14.4%
Other	11.1%	13.9%	0.0%	5.6%	5.6%	7.2%
None	5.6%	5.6%	5.6%	16.7%	38.9%	14.4%
Don't know	25.0%	13.9%	2.8%	22.2%	0.0%	12.8%

<sup>180</sup> Forcier Consulting and CARE International. (2017). *Market Assessment and Value Chain Analysis in Jonglei State*. ARC.

<sup>181</sup> Finn Church Aid. (2018). *Bor and Pibor Assessment Report*.

### Factors Influencing Business Success

When asked about the factors that contribute to business success, the trends were similar across all locations. The top two indicators of business success are thought by youth to be level of access to capital (66.7%, N=24) and skilled workers (54.4%, N=19). These are followed by good transport networks (40%, N=14) and in-demand products and services (30%, N=11). Other factors mentioned by respondents were careful management of the small profits made, the establishment of local markets by NGOs and reduction of taxes.

Perceptions of skills required to start businesses by the youth also followed a similar trend in all locations. The top two were business skills and language skills. Other skills mentioned were trade skills, seasonal investment methods and ways to develop connections.

Table 32: Skills Perceived to be Most Important for Youth to Start Business

Skills	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Business Skills	83.3%	100.0%	88.9%	72.2%	86.1%	86.1%
Language skills	75.0%	47.2%	38.9%	36.1%	69.4%	53.3%
Literacy	16.7%	11.1%	2.8%	16.7%	33.3%	16.1%
Numeracy	25.0%	13.9%	2.8%	44.4%	0.0%	17.2%
Trade skills in my profession	50.0%	27.8%	44.4%	16.7%	47.2%	37.2%
Connections	55.6%	50.0%	11.1%	19.4%	19.4%	31.1%
Other	5.6%	0.0%	0.0%	5.6%	0.0%	2.2%

### Type of Assistance Required

Following the perceptions of the factors contributing to business success, trends regarding type of assistance required to start businesses were similar across several locations. The majority of youth in Juba, Fangak and Wau mentioned a need for start-up capital and/or loans. In Twic, the trend was slightly different as a majority of Twic youth require technical and business training as well as toolkits. In Bor, a majority would like equipment and start-up capital while a few also require training.

Table 33: Type of Assistance Needed by Youth to Start Business

Type of assistance	Juba (N=10)	Fangak (N=10)	Twic (N=11)	Wau (N=10)	Bor (N=5)	Total (N=46)
Technical training	20.0%	20.0%	27.3%	0.0%	40.0%	19.6%
Business training	20.0%	30.0%	36.4%	30.0%	40.0%	30.4%
Toolkits	10.0%	30.0%	45.5%	50.0%	20.0%	32.6%
Equipment	20.0%	30.0%	0.0%	10.0%	80.0%	21.7%
Storage space	0.0%	20.0%	0.0%	0.0%	20.0%	6.5%
Office space	20.0%	20.0%	0.0%	10.0%	40.0%	15.2%
Start-up capital	80.0%	90.0%	9.1%	60.0%	60.0%	58.7%
Loan	40.0%	40.0%	18.2%	80.0%	40.0%	43.5%
Mentorship	30.0%	20.0%	0.0%	0.0%	20.0%	13.0%

Type of assistance	Juba (N=10)	Fangak (N=10)	Twic (N=11)	Wau (N=10)	Bor (N=5)	Total (N=46)
Other (please specify)	0.0%	0.0%	0.0%	10.0%	0.0%	2.2%

#### Potential to Source Material

In Juba, 38.9% (N=14) of respondents said they would buy materials from the local market to start a business. A quarter said they would purchase from markets in the county or from abroad (neighbouring countries). In Fangak, the local market was the most preferred market for materials. A total of 25% (N=9) said they would use markets in other regions of South Sudan, and 19.4% (N=7) said they would use markets in the county. In Twic, more than half of the respondents said they would buy materials from markets in other regions of South Sudan. In Wau, a third of the youth respondents each preferred local markets and markets in the state. Finally, in Bor, markets in the county were preferred for raw material purchase by 36.1% (N=13) of respondents, followed by markets in other regions in South Sudan, which was mentioned by 25% (N=9) of respondents.

#### 2.3.11. Youth Attitudes Towards Seeking Business and Employment Opportunities

Some cultural attitudes, such as prioritizing high salary, high job availability and low entry requirements when choosing a domain of work, are similar across locations. However, some other attitudes differ. For instance, over half of the youth in Juba, Twic and Bor said they are very willing to migrate elsewhere in South Sudan to seek better employment opportunities in the form of more jobs and higher pay. In Fangak and Wau, the trend was reversed as a majority said they are not at all willing to migrate. Youth in general are also less attracted to jobs which require manual labour such as masonry and even subsistence agriculture. Some secondary data suggests this may be because manual labour jobs are considered less dignified.<sup>182</sup> It also suggests that youth with lower educational levels are more flexible about their domain of training compared to those with slightly more advanced education backgrounds.<sup>183</sup> Women in particular seem to value certifications because it helps give them authority to insist on payments for their services or products and also to receive more respect from their community.<sup>184</sup>

A lack of jobs, compounded by very high competition, seems to contribute to certain negative attitudes amongst job-seeking youth. One male FGD participant from Wau (PoC) mentioned:

“Transparency is not at all in South Sudan and this means that people like doing things illegally, for example, when a position is put on public board then the first person who sees that advertisement will take it off from the public board in order not to compete with any person for that position as she/he doesn’t want other applicants to apply for that position.” - Wau POC, FGD, Male

There appears to be a fair amount of interest amongst youth in starting their own business, possibly due to the flexible working hours, and the potential to afford a higher decision-making power and avoid

<sup>182</sup> Women’s Refugee Council. (2010). *Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan*.

<sup>183</sup> *Ibid.*

<sup>184</sup> *Ibid.*

nepotism.<sup>185</sup> Currently, in Wau, young merchants represent no more than 10% of the workforce.<sup>186</sup> Amongst those who do not currently own a business (N=117), a vast majority (87% (N=102)) are interested in starting one. This complements the youth preference to receive trainings on business skills. However, there seems to be limited scope for youth to learn from other successful entrepreneurs in their own community due to high competition and hesitance to share lessons, as one FGD input demonstrates:

“Those people who started their own businesses can't tell us how they did it, how they got the business idea, set up the business and obtained funding because they keep everything a secret.” – Wau POC, FGD, Female

Youth were also asked if there are any products or services that are provided by humanitarian actors which they feel their local market or labour can or should provide. Most said agricultural tools, charcoal and seeds can be provided locally. In terms of services, they feel teaching in a school, hygiene promotion and repairing buildings are some services the local labour force could easily handle. The full range of responses is provided below:

Table 34: Humanitarian Goods and Services which Youth Feel can be Produced Locally

Items	% of respondents	% of respondents	Services
Agricultural tools	27.8%	36.7%	School teaching
Charcoal	27.2%	35.0%	Hygiene promotion
Seeds (for planting)	24.4%	25.0%	Medical treatment
Meat	20.6%	22.8%	Livelihood trainings
Fresh fish	17.8%	21.7%	Repair or building of schools
Bread (freshly baked)	13.9%	20.0%	Water system repair or building
Fruits/Vegetables/Nuts	12.8%	20.0%	Repair or building of toilets
Chicken/Goat/Livestock	11.1%	12.2%	Psycho-social support
Tools (agricultural & other)	11.1%	8.9%	Water trucking
Wood (firewood)	10.6%	7.2%	Don't know
Butter	8.9%		
Dried/Smoked fish	8.3%		
Eggs	7.8%		
Soap & washing powder	7.2%		
Animal fats & cooking oils	6.7%		
Mosquito nets	6.7%		
Fishing items/kits	6.1%		
Fruit products	5.6%		
Medicines	5.0%		

<sup>185</sup> Forcier Consulting and IOM. (2011). Market Assessment for Youth Vocational Training Opportunities. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

<sup>186</sup> Altai Consulting and GIZ. (2013). Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States.



Items	% of respondents	% of respondents	Services
Solar panels/chargers	4.4%		
Toiletries & Beauty items	3.9%		
Water irrigation systems	3.9%		
Prepared/processed food products	3.3%		
Stoves	3.3%		
Footwear	2.8%		
Clothes	2.2%		
Milk products (powder, UHT, fresh)	2.2%		
Staples (grains, sugar, salt)	2.2%		
Books & Stationary	2.2%		
Sand & Gravel	2.2%		
Bed articles (mattress, pillow, etc.)	0.6%		
Ploughs	0.6%		

Youth survey respondents were given an opportunity to share ideas for prospective youth businesses toward the end of the survey. Below is a word cloud of those responses, with the size of the words reflecting frequency of responses:

Figure 37: Word Cloud of Business Ideas Expressed by Youth



The secondary locations display similar patterns to the primary locations in relation to barriers to obtaining employment or starting a business. Women in particular not only face the same obstacles as men (such as barriers to finance, tools and nepotism) but, in addition, face female-specific discrimination and harassment as well. Although they would be willing to work in less traditional forms of work (like motorbike repair), there appears to be less opportunity for women in these areas due to cultural and gender norms and the need to care for children as well as to maintain the home.<sup>187</sup>

<sup>187</sup> Forcier Consulting and CARE International. (2017). Market Assessment and Value Chain Analysis in Jonglei State. ARC.

## 2.4. Findings from Mapping of Vocational Training Centres

The statistical analysis presented in this section represents findings from detailed assessment of 13 TVET/VT/skills development centres: nine in and around Juba, two in Duk and one in Twic East, collected and collated by the EMPOWER partners and supplemented by Forcier through a desk review of other relevant studies in the pertinent locations. Annex 6 and 7 captures additional summary information collected by EMPOWER partners for an additional 13 centres as well as an assessment Skills for Jobs project, funded by the European Union, for seven additional centres. Key findings from this additional summary information informed the non-statistical findings of the report. The sub-sections below detail the institutional setup of the 13 TVET/VT/skills development centres surveyed by EMPOWER such as the governance structures and quality assurance mechanisms in place, followed by an overview of the quality and relevance of the courses and facilities offered by these centres as well as the teaching and learning capacities they offer.

### 2.4.1. Institutional Setup and Organisational Capacity

#### Governance Structure

As per UNESCO's rapid assessment, the TVET sector in South Sudan includes the involvement of 21 government bodies, yet "the majority of TVET service provision is currently being implemented by non-government actors, which do not necessarily coordinate with the government."<sup>188</sup> The table below outlines the diverse legal statuses of the surveyed VTCs.

Table 35: Legal Status of VTCs Surveyed

What is the legal status of this TVET or VT Centre?	No. of VTCs
<b>CBO (Community Based Organization)</b>	1
<b>Local NGO</b>	2
<b>Church-funded institution</b>	1
<b>Government Institution</b>	2
<b>Private Business</b>	2
<b>Other (Specify)</b>	5
<b>Total</b>	13

A total of nine out of the 13 VTCs assessed were registered with the government at the time of inquiry. One VTC had plans to register soon, another had no funds for the registration and one VTC said their registration was stuck in mid-process as their registration had not received any follow-up. Seven of the nine centres who reported their data of establishment said they began operations after 2001, whereas two centres were established in 1958 and 1973, respectively.

All but two institutions have a Board of Directors/Governance/Centre Committee with the remaining two governed by MoGEI and MoLPSHRD. Management was primarily trained by a trainer from UN/NGOs/INGOs in seven VTCs, whereas two VTCs had a private institute conduct management trainings and one VTC utilised an independent training expert. The number of members on the board varied across the VTCs with four VTCs who have three to nine board members and five VTCs who have

<sup>188</sup> UNESCO. (2018). Rapid Assessment of the Technical and Vocational Education and Training (TVET) Sector in South Sudan.

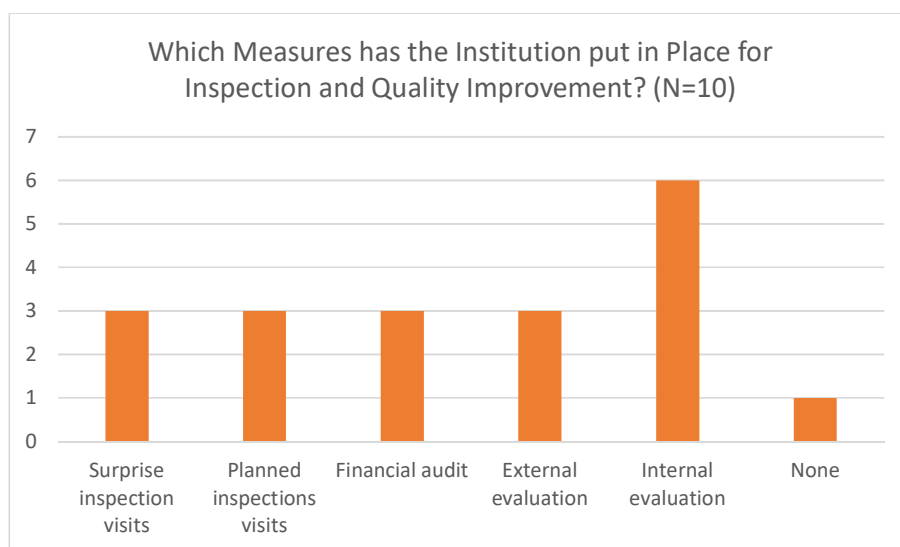
12-17 board members. Additionally, a report by Finn Church Aid found the Jonglei Christian Vocational School in Bor has three board members.

### Quality Assurance Mechanisms

Considerable efforts were seen to have been made by the government to draft curricula and frameworks for VTCs. These attempt to promote a mix of both theoretical foundation and practical application and emphasise the need to enhance quality through programming, certification and more active labour market linkages. However, the extent to which TVET/VT/skills development providers are aware of these curricula is a separate issue. Existing skills training programmes have generally been supply-driven and designed under the assumption that any and all types of trainings are desirable where provision is so limited. A lack of common standards and a formal certification system, extremely low literacy rates, language barriers and a general failure to systematically determine local demand for skills have all impacted the quality of training.<sup>189</sup> “The lack of effective synergy between the formal and informal systems is a concern with non-government actors implementing their own curricula. There is also concern that the curricula may not be labour market responsive and ignores the needs of various populations including at-risk youth (including those at-risk in becoming involved in conflict), rural/remote communities and women/girls.”<sup>190</sup>

The following graph shows the various measures that the surveyed VTCs reported having put in place for inspection and quality improvement.

Figure 38: Quality Assurance Measures



<sup>189</sup> Women’s Refugee Council. (2018). *Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan*.

<sup>190</sup> UNESCO. (2018). *Rapid Assessment of the Technical and Vocational Education and Training (TVET) Sector in South Sudan*.

The following table displays the actors who participated in activities related to inspection and quality improvement.

Table 36: Participation in Quality Assurance

Who participates in activities related to inspection and quality improvement?	No. of VTCs
School principal	6
School teacher	2
Director of Studies	1
Community leader	4
Minister or government officer	2
INGO/NNGO/UN staff member	4
Trainee /Youth representatives	2
Centre Education Committee (CECs)	4

#### Management Capacity

The average number of VTC board members is eleven, ranging from three to 17 across the surveyed VTCs. The head of the board varies from centre to centre but is usually the school principal/administrator (33%, N=3) or a community leader (22%, N=2). A Training Needs Assessment (TNA) conducted in Juba by the Directorate of Vocational Training of the MoLPSHRD found that most of the sampled managers are of older age and still hold the positions due to the lack of a functioning pension system in South Sudan.

More than half of the VTCs required that board or centre committee members meet the minimum qualification of a graduate diploma or degree, and the remaining do not have minimum qualification, a finding reiterated in the Juba TNA.<sup>191</sup> The same study also found that most sampled managers (85.7%, N=16) have had the chance to take part in trainings related to the management of VT centres, and most managers began their career as VT instructors before rising to management.<sup>192</sup> Managers were also reported to be more skilled in the English language than the VT instructors.<sup>193</sup>

Women are very much a minority on the board or centre committees with only two of the seven centres having a majority female board. A similar gender difference was also observed in the TNA in Juba.<sup>194</sup> All VTCs responded that they maintain regular meetings with all staff members of the institution, but the frequency of meetings varies from weekly to annually. The majority of VTCs said they have meetings either monthly or quarterly (71%, N=5). Almost half of the VTCs had their last meeting in June (43%), while all have had meetings since November of last year.

<sup>191</sup> Ministry of Labour, Public Service and Human Resources Development: Directorate of Vocational Training. (2017). *Vocational Instructors and Managers Training Needs Assessment Report*. Juba.

<sup>192</sup> *Ibid.*

<sup>193</sup> *Ibid.*

<sup>194</sup> *Ibid.*

The table below demonstrates the non-teaching staffing breakdown of the surveyed VTCs.

Table 37: Non-Teaching Staff at the VTCs\*

Does the TVET or VT Centre have the following non-teaching support staff?	No. of VTCs
Finance	5
Administration	8
Student Affairs	4
Logistics and Procurement	4
Human Resources	3
Facility management	7
Generator operators and the watchmen	1
Project officer	1

\*Data available only for 10 Juba-based VTCs

#### Cooperation with Other Stakeholders

As of June 2018, “there is no active TVET-wide governmental coordination group to govern activities across the country via inter-ministerial, inter-sector and/or coordination of non-governmental matters.”<sup>195</sup> However, there is still some engagement between VTCs and ministry bodies.

VTCs are almost evenly split as to whether they engage with the MoLPSHRD or not as six VTCs responded with “yes” and seven responded with “no.” The trend was similar for the number of centres engaging with the MoGEI. The absence of high engagement rates and lack of coordination is of some concern as “there are many actors in the sector implementing separately from one another building centres in a non-coordinated manner and developing their own curricula, certifications and more.”<sup>196</sup>

The VTCs surveyed who do engage with the MoLPSHRD and/or the MoGEI do so in a variety of ways displayed in the table below.

Table 38: Engagement with Government

	How do you engage with government ministries?	How do you engage with the government ministries?*
Receive teacher trainings	2	2
Receive management guidance	2	2
Receive curriculum guidance	4	1
Receive toolkits	1	0
Receive manuals/textbooks	1	1
Mentoring to trainees	1	1
Participation in sector committees in school	1	1
Field visits	3	1
Sharing information	6	3

<sup>195</sup> UNESCO. (2018). *Rapid Assessment of the Technical and Vocational Education and Training (TVET) Sector in South Sudan*.

<sup>196</sup> *Ibid*.

	How do you engage with government ministries?	How do you engage with the government ministries?*
Joint service provision	2	2
Receive guest lectures	0	1

\*Data available only for 10 Juba-based VTCs

Two VTCs mentioned engaging with other ministries, specifically the Ministry of Gender, Child and Social Welfare and the Ministry of Culture, Youth and Sport. They engaged with these two ministries by sharing information and jointly providing services, and also through providing apprenticeships. An assessment conducted by Finn Church Aid in Bor and Pibor also found some cooperation with MoGEI, but to a minimal extent as “whenever there is a graduation the ministers and directors are invited to the functions.”<sup>197</sup>

Several of the VTCs reported maintaining working relationships with other institutions such as UN agencies, NGOs/INGOs, private sector companies and local businesses such as garages. These partner institutions have been engaged with through the following ways:

Table 39: Number of VTCs Engaging with Partner Institutions, by Type of Engagement and Partner

Nature of the relationship with this partner	International NGOs	National NGOs	Private companies	Big garages
Receive teacher trainings	1	1	0	0
Receive funding	1	0	0	0
Receive management guidance	2	1	0	0
Receive funding	0	0	0	0
Receive curriculum guidance	1	1	1	0
Receive demonstration equipment	2	1	0	0
Receive toolkits	2	0	0	0
Receive manuals/textbooks	2	1	0	0
Provision of start-up capital for graduate businesses	0	0	0	0
Mentoring to trainees	0	0	1	0
Internship	0	0	2	1
Apprenticeship	0	0	1	0
Receive guest lectures	0	0	0	0
Participation in Sector committees in school	0	0	0	0
Field visits	2	1	1	0
Refer cases (protection, health, education services)	0	0	0	0
Sharing information	2	2	2	1
Joint service provision	2	2	2	1
Other (specify)	0	0	0	0
Don't know/Not sure	0	0	1	0

<sup>197</sup> Finn Church Aid. (2018). *Bor and Pibor Assessment Report*.

### Institutional Policies

A significant majority (9 out of 13) of the VTCs work with a school development plan, a majority of which (N=6) had revised the plan at least once between 2016 and 2018. The plan was typically developed in consultation with the teaching staff, school board, and partner staff. As plans were developed in a consultative fashion, they are likely to reflect the true priorities of the VTC. The top two priorities of the plans include training teachers and increasing the variety of courses offered. Tertiary considerations are increasing the number of cohorts, setting up graduate tracking programmes, and increasing the salary of teaching staff. In terms of priority fulfilment, VTC representatives reported that they had most success in training teachers, and less so in increasing the number of cohorts and courses offered. VTC policies were reported to be well-documented as can be seen in the table below.

Table 40: Institutional Policies Possessed by VTCs\*

Does the institution have clearly written and documented policies and procedures?	No.
Participation of girls and women or a gender policy	3
Teacher salaries and incentives	4
Teacher recruitment	5
Capacity development of teachers	3
Participation of persons with disabilities	2
Financial management of the VTC	3
Student complaints/feedback mechanisms	1
Teacher code of conduct	5
Preventing sexual exploitation	3
None of the above	3
Don't know / Not sure	0

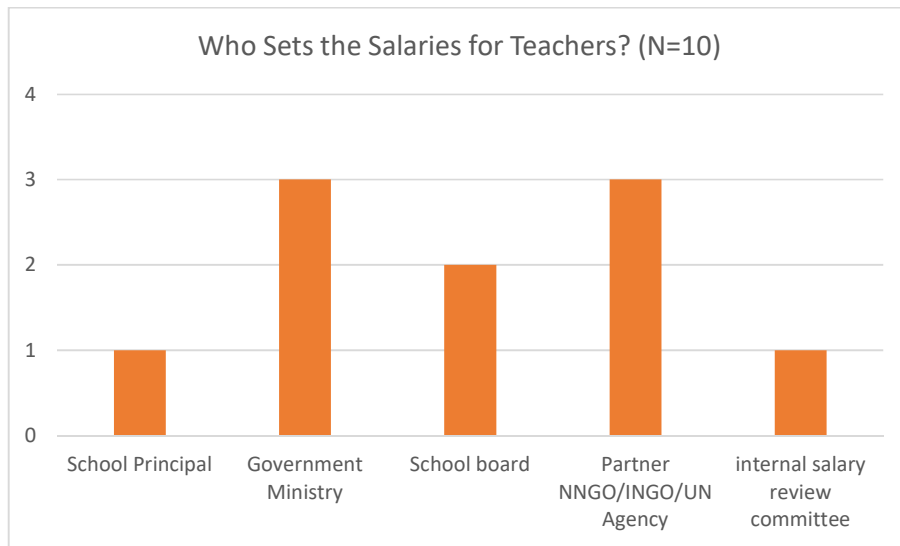
Policies were reportedly reviewed once a year or once in two years among the responding VTCs. 83% of VTCs make their students and staff aware of or trained them on these policies. Six out of the eight VTCs who responded to this question stated that they made their students and staff aware of or train them on these policies. All but one of the VTCs said that they work with accurate and well-defined job descriptions for their staff. These descriptions have been updated from as far back as 2005 to as recently as 2017.

Funding for the Juba-based VTCs comes primarily from the NGOs/INGOs/UN agencies (50%, N=7) then from trainee fees (29%, N=4) and churches (21%, N=3). Accurate information on funding sources for the remaining VTCs was not available.

### Salary and Incentive Scales for Teachers

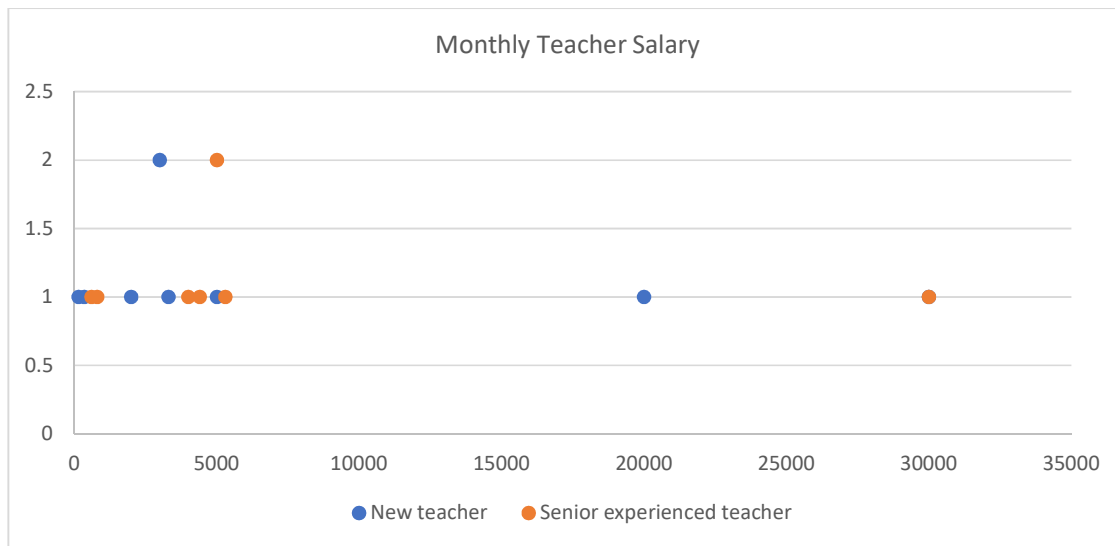
Salaries for teachers are set by a variety of actors as displayed in the Figure 39.

Figure 39: Teacher Salaries - Who Sets Them?



Partner organizations have the largest say in determining the salaries and incentives, most likely because they are also the largest source of funds as seen previously. The graph below demonstrates the starting salary for new teachers with little or no previous teaching experience and the salary for senior experienced teachers.

Figure 40: Distribution of Teacher Salaries



Teachers' salaries are revised based on their years of teaching experience, years of teaching at the VTC and their educational qualifications. Six out of ten VTCs who shared information about the criteria for staff salaries said they also offer teachers additional incentives such as bonus pay for achievements other than high passing rates of students, holidays and sick leave. Very few offer teachers profit from selling of goods produced in training, incentive for additional assignment or a token of appreciation as reported by one VTC. None of the VTCs said they offer their teachers bonus pay for a high passing rate of students.



### Physical Infrastructure and Assets

Across South Sudan, “most financing of the TVET is undertaken through development partners with the major donors being the EU, Canada and Japan. There are limited opportunities for individuals to undertake TVET via non-institutional classroom/workshop provision.”<sup>198</sup>

In terms of physical infrastructure and assets of the VTCs, all but one had some land belonging to the VTC. Four VTCs had less than one acre of land, two VTCs possess 2-4 acres of land, four VTCs have 5-7 acres and one VTC each has 8-10 acres and 11-15 acres of land. This land overall reportedly supports up to nine offices with a third of all VTCs having just one office. Most VTCs, 75% (N=9), do not have staff houses at the institution.

The following table displays the assets of the surveyed VTCs.

Table 41: Assets Possessed by VTCs

No. of assets	Cars	Buses	Motorcycles	Tractor
0	6 VTCs	9 VTCs	8 VTCs	11 VTCs
1	2 VTCs	2 VTCs	2 VTCs	1 VTC
2		1 VTC		
3	1 VTC		1 VTC	
4	2 VTCs		1 VTC	
9	1 VTC			
<b>Total</b>	12 VTCs	12 VTCs	12 VTCs	12 VTCs

### 2.4.2. Quality and Relevance

The VTCs were also asked about the kind of frameworks they have in place to assess and evaluate the performance of teachers and students as a means of understanding the level of professionalisation of their training provision. The quality and relevance of the VTC functions was further studied based on their efforts to track labour market needs, engage with employers and monitor the post VT-graduation transition of graduates.

### Assessment and Evaluation Framework

A majority of VTCs responded that they do have a written framework or guidelines to assess the performance of both teachers (70%, N=7) and trainees (90%, N=9). However, there is no overarching framework, aggregate database or data-sharing across centres, and so the assessment and evaluation data caters to the needs of each VTC individually.

### Tracking Labour Market Needs

One concern about the link between TVET/VT/skills development and labour markets is that, in South Sudan, “there are many stakeholders offering skill courses related to a perceived, rather than a ‘real’ labour market.”<sup>199</sup> The surveyed VTCs primarily depend on guidance by INGOs/NGOs/UN agencies in order to determine their course offerings, which means their methodologies may differ in their robustness and accuracy. The next most common methods are dependent on funding and on the skills

<sup>198</sup> UNESCO. (2018). Rapid Assessment of the Technical and Vocational Education and Training (TVET) Sector in South Sudan.

<sup>199</sup> *Ibid.*

in demand in the labour market. Only four VTC representatives said they consult directly with young people. Five VTCs said they also choose their courses based on their perception of skills in demand in the labour market. A study by Women’s Refugee Council (WRC) found that training programmes that achieved the best results establish a relationship with current and prospective employers in order to link graduates to jobs and gather feedback on the training.<sup>200</sup> For example, Juba Catering Services (JCS) has a good track record of linking graduates to potential employment opportunities as the director has established a network of contacts with employers in the Juba hospitality industry. Students are placed with employers post-training and regular follow-ups are made to check on graduates’ progress. JCS also uses these follow-ups to receive feedback from employers and to spot gaps or a failure to meet standards in the training. Deepening the connection between VTCs and the labour market would increase demand for the trainings as a trusted route towards employment.

### Employer Engagement

Although the majority of surveyed VTCs said they do help their students find jobs after graduation, most do not engage in any way directly with employers. The VTCs help students find jobs after graduation in a variety of ways including the following: informing students about job vacancies (25%, N=5), providing references to companies, (25%, N=5), providing career counselling (20%, N=4), job placements (10%, N=2) and priority recruitment by partner companies (5%, N=1). The table below shows employer engagement.

Table 42: Engagement with Business Sector\*

Employers from which sectors do you mostly engage with?	No.
Arts and crafts	1
Barber/hairdresser	2
Business - Entrepreneurship/Management	1
Catering (incl. bakery/pastry/pizza making)	1
Computers/ICT	1
Building and construction site labourer	1
Dobbi/dry cleaning	1
Electronics – systems installations	1
Electronics – solar panel installation and repair	1
Generator repair (auto-mechanics)	1
Literacy – English	1
Masonry	1
Mechanic – Auto	2
Mechanic – Boda	1
Plumbing	1
Tailoring and fashion design	2
<b>Total</b>	<b>19</b>

\*Data available only for 10 Juba based VTCs

The two most frequently observed are barber/hairdresser and tailoring/fashion design, but the remaining employers are quite dispersed. The reasons why VTCs engaged with certain employers are

<sup>200</sup> Women’s Refugee Council. (2010). Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan.

four-fold: employers are open to collaborate (33%, N=3), relevant to our courses (22%, N=2), employer in need of trained labour (22%, N=2) and employers recognize our certification (22%, N=2). The employers and corresponding sectors reported to be most difficult to engage with are displayed in the table below.

Table 43: Business Sectors Difficult to Engage with\*

Employers from which sectors are the most difficult to engage with?	No.
Agriculture – mechanised (vegetable/seed/crop production)	1
Animal healthcare	1
Business- Entrepreneurship/Management	1
Catering (incl. bakery/pastry/pizza making)	1
Carpentry and joinery	1
Fish farming and processing	1
Hospitality services (hotel/restaurant/bar)	2
Livestock management (herding/selling)	1
Plumbing	1
Welding & metal fabrication	1
<b>Total</b>	<b>11</b>

\*Data available only for 10 Juba-based VTCs

The reasons VTCs have had difficulty engaging with employers from the sectors above include the following: employers are unwilling to collaborate with the TVET/VT/skills development centre, the employers have other requirements, the TVET/VT/skills development courses are not relevant to the employer’s domain of work or they lack funding (25%, N=1, each). One possible reason for the lack of willingness to engage might be the practice of nepotism as explained by one respondent from Kwajok: “In Kwajok market, South Sudanese merchants tend to work alone or with relatives, but rarely employ non-relatives on their stalls.”<sup>201</sup> None of the VTCs said that they offer incentives to businesses who choose to establish a relationship with the TVET/VT/skills development centre.

#### Graduates Network

The majority of VTCs reported not having any network of graduates (50%, N=5). Of those who do have a network, two have a formal network, one has both a formal and informal network, and two have both. All were reported to be active. These active networks equally serve to share training experience, training opportunities, job vacancies, social updates and are used for professional networking. Networks are either run by the school administration or teachers or graduates themselves. A close majority of VTCs do not keep track of their graduates (60%, N=6). Of the few who do monitor their graduates, estimates as to what percentage of graduates find a job within six months of graduation vary between 40% and 80%. Graduates were perceived to be more likely to start their own business rather than finding a job after graduation.

#### 2.4.3. Teaching and Learning

VTCs were also assessed for their teaching and learning capacities, and for any systems they have in place to assess teacher qualifications and track performance of teachers and students. Furthermore,

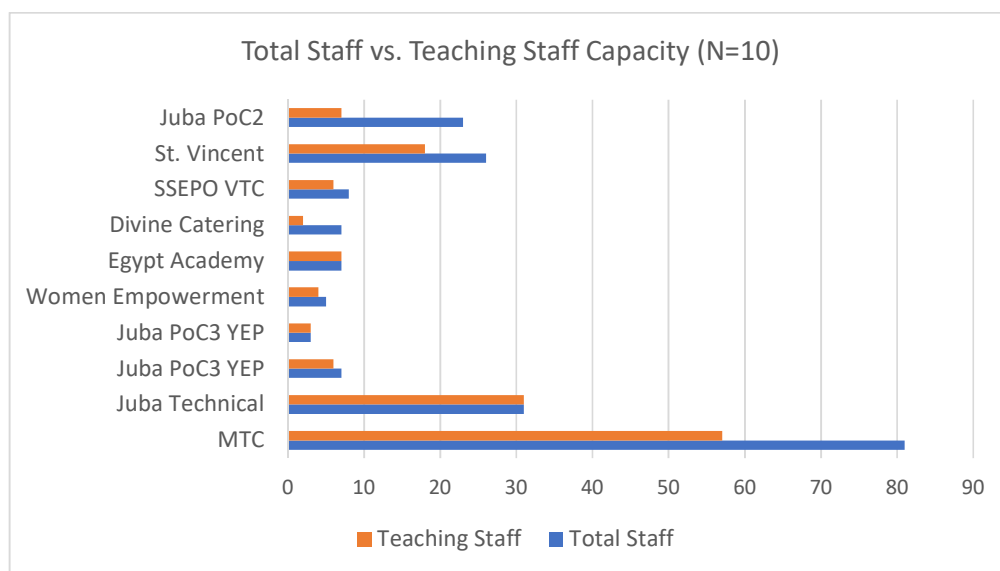
<sup>201</sup> Altai Consulting and GIZ. (2013). Market Assessment in South Sudan: Northern Bahr Al Ghazal, Western Bahr Al Ghazal and Warrap States.

the survey attempted to capture the quality of teaching and learning by assessing the types of teaching methodologies, curriculum and instructional material in use.

### Student and Teacher Strength

The number of staff members who are working at the VTCs ranges from three to 81. In all but two cases, the majority of the total staff is comprised of teaching staff. The two exceptions were Divine Catering VTC and Juba PoC-2 VTC, for which non-teaching staff numbers are far greater than teaching staff numbers. The chart below shows the breakdown by VTC surveyed.

Figure 41: Number of Staff Working at VTCs\*



\*Data available only for 10 Juba based VTCs

### Retention Rates

Dropout rates from other studies suggest that dropout rates are expected to be 20-30% through the duration of a course.<sup>202</sup> Courses reported to experience the highest dropout rates are barber/hairdresser, blacksmith, carpentry and joinery, building and construction, English literacy, masonry and shoe repair. Courses reported to have the lowest dropout rates are catering, computers/ICT, electronics – systems installations, hospitality services, literacy and mechanic – auto and boda. One barrier noted in Bor was that “special needs education is not attended to.”<sup>203</sup> This also applies to technical and vocational education as well as secondary education.<sup>204</sup> Lastly, the WRC study found that a lack of motivation among students was brought up consistently as a key challenge for training providers. This was considered by some to be the result of decades of receiving aid handouts, which potentially decreased the motivation to earn income.<sup>205</sup>

<sup>202</sup> Forcier Consulting and IOM. (2011). Market Assessment for Youth Vocational Training Opportunities. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

<sup>203</sup> UNKEA. (2018). Bor South Issue Mapping Report.

<sup>204</sup> *Ibid.*

<sup>205</sup> Women’s Refugee Council. (2010). *Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan.*

### Teacher Qualification

The training needs assessment conducted in Juba uncovered several trends regarding the qualifications of VT instructors in the city. First, a large number of the instructors were at the start of their career and lacked experience. While they did find more seasoned instructors with experience of over ten years, this was a minority of the sample they studied.<sup>206</sup> This could also be because teachers are drawn towards employment in other sectors as noted in UNESCO's rapid assessment: "the fragmentation in teacher/facilitator/instructor remuneration has also caused a workforce shortage for the government as many teachers/facilitators/instructors pursue employment with other actors."<sup>207</sup>

Second, except in very limited cases, instructors are working in providing training in trades similar or related to their fields of study.<sup>208</sup> Third, most instructors and managers want to further their education level and complete one additional degree. For example, those who hold Craft Level I Certificate would prefer to get a Craft Level II Certificate and Diploma.<sup>209</sup> However, seeking advanced training for the trainers is challenging as one difficulty observed in UNESCO's rapid assessment was that "there is also limited support for teachers'/facilitators'/instructors' education as many activities have focused on access."<sup>210</sup>

Fourthly, almost three-fourths of the study respondents (73.6%, N=16) have previously attended trade-related short courses (up to three months long) in the past two years, in different countries across the world, in the English language and sponsored by international organizations.<sup>211</sup> Fifth, only about half of the instructors can manage writing and speaking in English, while a few cannot at all.<sup>212</sup> Finally, most instructors and managers have indicated that they are capable of performing those traditional VT activities like preparation, conduction and examination but lack modern skills like application of ICT and audio visual aids, career counselling and providing feedback.<sup>213</sup>

### Curriculum in Use

Curricula vary across TVET/VT/skills development centres with little standardisation. For example, the Jonglei Christian Boarding Vocational School in Bor "currently uses training curriculum they adopted from a school in Uganda with additional activities from their teachers (trainers) who are qualified and experienced in their fields."<sup>214</sup> In the same area, the Bor Vocational Training Centre that was constructed by the Korea Child Fund and is being revived by NRC has plans to offer carpentry training under the aegis of the current principal. This principal had trained as a carpenter for three years in Kenya and has developed his own curriculum that he has been using over the years as he states there is no national TVET curriculum to follow.<sup>215</sup>

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<sup>206</sup> Ministry of Labour, Public Service and Human Resources Development: Directorate of Vocational Training. (2017). *Vocational Instructors and Managers Training Needs Assessment Report*. Juba.

<sup>207</sup> UNESCO. (2018). *Rapid Assessment of the Technical and Vocational Education and Training (TVET) Sector in South Sudan*.

<sup>208</sup> Ministry of Labour, Public Service and Human Resources Development: Directorate of Vocational Training. (2017). *Vocational Instructors and Managers Training Needs Assessment Report*. Juba.

<sup>209</sup> *Ibid.*

<sup>210</sup> *Ibid.*

<sup>211</sup> *Ibid.*

<sup>212</sup> *Ibid.*

<sup>213</sup> *Ibid.*

<sup>214</sup> Finn Church Aid. (2018). *Bor and Pibor Assessment Report*.

<sup>215</sup> *Ibid.*

### Teaching Methods

Teaching methods are two-fold, as they include the methods used to reach different target populations as well as the methods that instructors are able to use given the resources and capabilities that are present.

A WRC study found that teaching skills to a largely illiterate audience of trainees who lack primary school education presents a significant challenge. This slows the pace of teaching and can diminish the quality of even practice-based lessons. Some VTCs adopt the approach of admitting those who have not completed P8 into the practical trades such as construction and metal work, which require only minimal literacy and numeracy.<sup>216</sup>

A TNA study in Juba found that instructors requested training in the following methods and skills in order to improve their vocational training: 1) use audio visual and multimedia equipment; 2) apply ICT 3) design assessment tools; 4) develop curriculum; 5) conduct career counselling; 6) providing feedback; 7) plan and conduct assessments; 8) plan training sessions; 9) develop teaching and learning materials and 10) communication skills.<sup>217</sup>

### Courses on Offer

There is existing information in the literature about TVET/VT/skills development course offerings particularly in Wau. Don Bosco VTC currently offers courses in mechanics, masonry, carpentry, building, printing and computer skills and is considering a course in hospitality for the hotel business. Courses last between six months and two years. The Disarmament, Demobilisation and Reintegration Commission is currently offering training in English, literacy, numeracy and social awareness on issues such as HIV/AIDS prevention. The commission also provides agricultural and business training for people in rural areas, which have both proved extremely popular. They sometimes help to place people in Don Bosco VTC for courses such as mechanics, but as the majority of people they work with live in rural areas, they cannot access the VTCs in Wau town.

At Wau VTC, in 2010, 50 trainees were enrolled in the following courses: carpentry (seven students), electrical (15 students), masonry/construction (ten trainees) and welding (eight trainees). While no students were enrolled in 2011, the Wau VTC had the capacity to handle an estimated 60 students and capacity projections have since been adjusted to accommodate 100 students, 20 in each of the five courses offered. Follow-up is required for more up-to-date figures.

DORCAS VTC has been operating in Wau since March 2011 and offers courses in English, literacy, computer skills, tailoring, horticulture and business skills as well as facilitates apprenticeships for bakery skills. Each course lasts three months.<sup>218</sup>

In Bor, the Jonglei Christian Boarding Vocational School was founded in 2015 with friends from the Starfish Foundation, and since then has been training youth for six-month periods, with two intakes

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<sup>216</sup> Women's Refugee Council. (2018). Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan.

<sup>217</sup> Ministry of Labour, Public Service and Human Resources Development: Directorate of Vocational Training. (2017). Vocational Instructors and Managers Training Needs Assessment Report. Juba.

<sup>218</sup> Forcier Consulting and IOM. (2011). Market Assessment for Youth Vocational Training Opportunities. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

each year. Courses offered are electrical, computers, tailoring, agriculture and bible/religion for all the registered learners. Trainees pay 5000 SSP for one course. At the time of the report there were 67 students in training for the July – December intake.<sup>219</sup>

#### Instructional Materials

In Wau, the organisation DORCAS has pioneered micro-savings schemes for their graduates, which have been a success. As one respondent described, “Initially graduates were not keen on the idea of a savings scheme, but DORCAS has since overcome this by undertaking to provide 400SSP of in-kind support to the group once they have saved 800SSP, for example buying a large amount of flour for students who had saved 800SSP together after completing the bakery apprenticeship. This in-kind support [was] then used to generate further income, providing a sizeable fund for students to consolidate their own businesses.”<sup>220</sup>

However, this kind of success requires considerable efforts to convey the concept of resource-pooling and sharing. As documented by a WRC study, the NGO BRAC's microfinance and business skills trainers noted that it can be difficult to make beneficiaries understand that the money given to them is a loan and not relief and said that some beneficiaries even react angrily at the suggestion they should repay the money.<sup>221</sup>

In Pibor, representatives of MoGEI of Boma State declared that “if need be they in the Ministry of Education and Ministry of Physical Infrastructure can allocate a land for establishing the Vocational School Training [facilities] and they [previously] did with the youth centre so that trainings can be hosted in it.”<sup>222</sup> This type of institutional support is also crucial and promising for the success of future TVET/VT/skills development interventions.

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<sup>219</sup> Finn Church Aid. (2018). *Bor and Pibor Assessment*.

<sup>220</sup> Forcier Consulting and IOM. (2011). Market Assessment for Youth Vocational Training Opportunities. Accessible via [www.forcierconsulting.com](http://www.forcierconsulting.com)

<sup>221</sup> Women's Refugee Council. (2018). Starting from Scratch: The Challenges of Including Youth in Rebuilding Southern Sudan.

<sup>222</sup> Finn Church Aid. (2018). *Bor and Pibor Assessment*.

## Conclusions

South Sudan must strive to overcome numerous challenges in an effort to improve the functioning of its labour markets. The existing economic and security challenges increase the difficulty of any labour market intervention. Labour supply is limited in the context of a history of poor human capital development due to the myriad factors previously discussed. Labour demand is also significantly constrained by minimal consumer demand, weak transport and communication connectivity in-country, a heavy dependence on oil revenue and limited exports. However, the population is primarily comprised of young people who are willing to work – both positive attributes which can be leveraged to improve the functioning of labour markets.

The study has revealed that there is immense scope for several trades to expand in all the markets surveyed. However, fundamental challenges which require immediate attention exist across all markets. Across all locations, businesses want to expand, consumers are in need of more and better quality products and services and youth are eager to work and set up businesses. Nevertheless, the absence of a well-functioning formal financial system creates a common barrier for all these potential growth areas. This barrier is visible in the form of high prices for consumers and lack of capital and easy access to financial institutions for other market actors. This influences the ability of small traders to expand businesses despite positive intentions and to employ youth despite the availability of skills in the labour market ultimately influencing their ability to satisfy the demand deficit for several products and services. In order to avoid this poverty trap, the financial barriers need to be taken into account both for future TVET/VT/skills development programming and also to contextualize the other conclusive trends the study revealed, which are summarised below.

While small differences exist between the locations, broad trends are evident in examining the data in the aggregate. Based on the level of demand for products/services on the consumer side and consumers' reported reasons for dissatisfaction and availability of jobs in the market, the following trades can be considered to be in high demand<sup>223</sup> of labour across all locations: beautician, leather work, livestock management (herding, selling), mobile charging services, tailoring and fashion design, welding and metal works, soap and beauty item fabrication and books and stationary fabrication. Based on the same factors, trades observed to be in medium demand<sup>224</sup> include the following: mechanised agriculture, subsistence agriculture, arts and crafts, hairdressing, catering, computers/ICT, construction, dairy farming, dry cleaning, systems installation, appliance repair, fish farming, food processing, generator repair, healthcare, hospitality service, honey production, masonry, bicycle and boda mechanic, poultry farming, plumbing, shoe repair, driving, photography, printing, auto spare parts supply/reselling, wood works, medicine production and consumer goods (such as sports equipment, mobile phone accessories). A detailed analysis is provided in Annex 2 - assessment of skills in demand in each sector.

From the above list, in Juba and Wau, consumers primarily struggle with poor quality, while in Fangak, Twic, and Wau, lack of availability is a consistent issue. In Kwajok the most unmet demand is for poultry,

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<sup>223</sup> Based on 50% or more consumers mentioning that they are dissatisfied with the concerned product or service due to high prices, availability, poor customer service or poor product quality.

<sup>224</sup> Based on 25 to 50% or more consumers mentioning that they are dissatisfied with the concerned product or service due to high prices, availability, poor customer service or poor product quality.



fish and mobile phone repair. In Lainya the highest demand exists for oil, flour and goat meat. Duk and Pibor have high demand for agricultural products and infrastructure repair.

Willingness to expand business was observed to be very high across all locations. Driving was seen to be amongst the top sectors which plans to employ several people. Additionally, there were a few other businesses which plan to hire several (more than eight) employees in the near future. In Juba, these included driving, printing and boda mechanic services; in Twic, driving, hairdressing and boda mechanic businesses; in Wau, driving, hospitality and appliance repair/spare parts businesses; in Bor, hospitality businesses; in Fangak, general trader or retailer businesses; and in Kwajok, hospitality businesses and agricultural products. All secondary locations expressed interest in microfinance and other forms of gaining start-up capital.

The general VT experience indicates mixed success. The positive side is that youth perceive VTs to add a lot of value to the profile of a job aspirant and believe that it can help them obtain a better salary. On the other side, the data suggests that not many people are able to gain employment immediately after their VT graduation. The prevalence of career counselling is also very low, which can improve a youth's career planning and job preparedness.

Regardless of their VT update, youth face numerous other obstacles when seeking employment which also impact overall employment rates. There is a sense of despair amongst the youth that job searches have extremely low success rates due to high competition and prevalence of employment based on connections. This may, in part, explain the generally high proportion of youth willing to start businesses. However, the fact that youth tend to choose access to capital and start-up grants over skills and knowledge as support conveys their attitudes and potential motivations to undertaking business skills training. In other words, they may be more motivated to start their own business if equipped with the start-up capital and/or tools in addition to skills and knowledge.

A clear difference was seen in the perceptions held between business owners and youth about the type of support youth require to start a business. Young people are more likely to rank their need of start-up capital, loans and toolkits ahead of their need for technical and business trainings, whereas business owners would like youth to develop their technical and soft skills to improve their customer service quality as well. In Juba, Fangak and Wau, business owners express frustration with the lack of customer service skills in the current labour market, while in Twic and Wau there is a low supply of candidates in general. Youth, overall, perceive themselves to have an adequate skills base and wish to build further on these skills rather than undertaking training in an entirely new trade. However, there may be deviance between their perceived and actual skills bases, especially given the considerable proportion of youth working in unskilled labour jobs or struggling to find employment in several sectors such as agriculture and business management (despite vocational training). This is reiterated in the data for the secondary locations, where youth express interest in more technically demanding work despite currently lacking the requisite skills as these trades were perceived to be more fruitful.

Youth clearly rate their ability to "enjoy" their chosen domain as one of the few important factors that matter when choosing their trade after a good salary and low entry requirements. This could help explain the observed gap between trades perceived by the community as providing an income versus trades perceived by youth as providing them good employment opportunities. In part, this gap may be

the result of the perceptions of respectability of the trade, ease of entering the domain and potential for growth, which are more aligned with youth aspirations. This might also explain why half of the youth surveyed were actively looking for a change of job despite being employed as they seek jobs which gain them more respect and room for growth. Charcoal-selling is one such controversial trade as it is among the most frequently purchased products in all locations sold by youth in Wau and Bor, yet it is considered the least profitable trade and appears to carry connotations of 'dirtiness' that render the trade socially undesirable for youth.

Professionalised courses such as computer/ICT, healthcare, finance, barber, appliance repair work, tailoring and mobile charging/repair business courses appear to provide more sustained amount of work in a week, which indicates a need for better market penetration in these domains. Mobile phone repair demand is particularly noticeable in Kwajok, which is undergoing a mobile phone boom at present. Further differences between domains by location are not apparent.

VTs were perceived to be useful by most recipients in all locations except Wau, where fewer VT graduates found VTs to be useful. Across locations, those who do not find trainings useful typically cite the lack of capital or tools to put trainings into action after the end of the course as the reason. The number of youth who have received VTs is also low and was observed to be tied to low awareness about VT opportunities and the perception that there were not many VTs available. Awareness about where to seek training opportunities was significantly lower in Wau than other locations. Rates of employment post-VT were observed to be quite low as well, which can be attributed mainly to the lack of job availability. This points towards the lack of support from vocational training providers for transition of graduates from VT graduation to the job market. This is compounded by the general lack of tracking and tracing of ongoing skills deficits in the local market to inform the selection of VT courses on offer at VT providers. The VT providers in Juba are the strongest example of a VTC making these links, which is seen less in the other locations.

On the VT providers' front, course offerings have emerged to be mostly supply-driven due to the widespread notion that any and all types of trainings are desirable where provision is so limited. The next most common methods to determine course offerings depend on funding, while a few also look at the skills in demand in the labour market. Trainings offered in the secondary locations in the past have focused entirely on agricultural improvements. A lack of common standards and a formal certification system, extremely low literacy rates among participants, language barriers and a general failure to systematically determine local demand for skills have all impacted the quality of training. Language trainings especially must not be overlooked as an avenue for intervention, as language acts as a catalyst and compounds the effects of other trainings or existing skills of participant. The absence of a coordination platform where VTCs, implementers, ministerial bodies and donors can interact is a limiting factor to implementing a coordinated effort to build youth capacities. On the positive front, policies regarding gender inclusion, teacher salaries and teacher code of conduct do exist in many VTCs.

Currently, the engagement of VTCs with employers is also very low. The engagement is mainly indirect, through provision of job references, dispersion of information on job vacancies and some limited career counselling. Most VTCs do not actually engage with employers or have any tie-ups which could provide on-the-job training, priority recruitment or any other type of exclusive value added opportunities to VT graduates.

## Recommendations

All of the research components of this study reiterate the fact that South Sudan faces many challenges which its people and leaders must systematically resolve with a set of smart, targeted strategies, calling upon the support available to them from development partners, government will, donors, subject experts and civil society. A summary of the recommendations detailed in this section, categorized as short, medium and long-term recommendation, are presented below. This section is composed of three parts: 1) sector-specific macro-level recommendations for South Sudan; 2) general VT recommendations applicable across the locations surveyed in South Sudan and 3) location-specific VT recommendations.

With all these recommendations, however, it is important to understand the limitations of policies and programmes. The continuing conflict in South Sudan will likely play a major role in its economy. For instance, if the government implements a policy aimed at improving the skillset of farmers to better cultivate their land, its impact will likely be severely limited if farmers are unable to tend to their land due to concerns over their own safety.

*Table 44 : Recommendations: Short-, Medium- and Long-Term*

Short-term Recommendations	Medium-term Recommendations	Long-term Recommendations
Increase awareness about technical and vocational training opportunities through well planned outreach campaigns.	Adopt a demand-driven approach to determine priority trades.	Consider providing adequate warehouse or storage facilities in the place of sale to reduce burden of transportation during unfavourable weather conditions.
Provide skills training with a focus on core techniques for beginners are recommended in driving, photography and videography.  The following trades are recommended for skills training with a focus on cost-reduction and/or quality-improvement of incumbent products/services: agriculture (mechanized), agriculture (subsistence), hairdressing, beautician, catering, computers/ICT, construction work, dairy farming, dobbi/dry cleaning, systems installations, appliance repair, solar panel installation and repair, food preparation/processing, generator repair, auto mechanic, healthcare (doctor/nurse), honey production, leather work, livestock management (herding/selling), boda mechanic, poultry farming, plumbing, shoe repair, printing and design, soap & beauty item fabrication, auto spare parts production, wood works, tailoring and fashion design, welding & metal fabrication,	Invest in skills training along the various steps of the agricultural value chain for grains such as millet, wheat, sorghum etc. as these continue to be in high demand across South Sudan.  Spread out agricultural trainings to cover different processing methods so groups of youth are trained in cleaning, drying, blending and storage of grains as well as flour and feed milling, and packaging.	Think creatively to look at other untapped potential to stimulate market growth.

Short-term Recommendations	Medium-term Recommendations	Long-term Recommendations
masonry, mobile charging services (solar + generator), books & stationary fabrication and medicine production.		
Include basic literacy and numeracy classes in vocational training programs.	Prioritize vocational trainings which help youth produce food items and soap as these were reported by youth to make up the major chunk of their expenditures.	Better equip youth, especially women to fully utilize the power of web and orient the youth towards productive uses of internet..
<p>Prioritize provision of toolkits to trainees in following VT programs: hairdressing, blacksmith and appliance repair.</p> <p>Provide a combination of toolkits and start-up capital or loans for: agriculture (mechanized), agriculture (subsistence), animal healthcare, business (marketing), catering, carpentry &amp; joinery, computers/ICT, dobby/dry cleaning, generator repair, healthcare (doctor/nurse), mobile charging services (solar + generator), mechanic – bicycle and mechanic – boda.</p>	Think creatively to look at other untapped potential to stimulate market growth.	
Introduce soft skills training with a focus on inculcating customer service skills, inter-personal skills, communication and teamwork skills.	Concentrate efforts on easing access to capital or micro-loans for youth interested in starting businesses.	
Provide career counselling as a means to help orient the youth better in terms of job search and preparedness.	Put in place a tracking system to monitor progress of graduates, to learn about how they cope with the job environment, the kind of obstacles they face and in what ways the VTC learning helps them to overcome those challenges.	
Assess motivation when evaluating entry applications for VT programs.	Consider providing a “total package” to youth, which includes technical and soft skills trainings, start-up support in the form of capital, tools and guidance, potentially refresher trainings further in time and most importantly, continued monitoring much after they have graduated.	
<p>Devise measures to offer childcare or creche facilities in the TVET/VT/skills development centres as this has immense bearing on the ability of women to enter and complete VTs.</p> <p>Set-up on-campus shops which sell inputs, stationary items and basic food and non-essential items can be of immense help to trainees by easing their access to such items.</p>	Provide direct linkages with employers via work-based learning opportunities including internships, apprenticeship or career opportunities.	
	Take into account adequate security mitigation measures to offer a safe and secure environment for trainees.	

Short-term Recommendations	Medium-term Recommendations	Long-term Recommendations
	Acknowledge the cultural attitudes at play, in terms of preferential employment of members of one's own tribe, family or locality.	

## Sector-specific Recommendations

In the short-term, to improve the labour market, South Sudan should make strong efforts to strengthen its most dominant sector, agriculture (and its subsector, livestock). Given the high number of South Sudanese who are tied to agriculture (and livestock), improving the productivity and lessening the inefficiencies of this sector should help improve job prospects and financial rewards. The list of sector-specific recommendations is as follows.

### Agriculture

- In the short-term, the government should create incentives to cultivate the substantial amount of unused fertile land in South Sudan (e.g., cash/food for work programs). This would help create work for farmers and help increase the amount of food produced for the domestic market, which is facing a shortage of food, partly explaining why prices are so volatile. In the longer-term, increasing food production could help South Sudan create a stronger export market.
- The government should also create programmes to help train farmers on better farming techniques, particularly high-yield technologies like irrigation and the use of ox plows. It can also try to help provide them better tools and better seeds.<sup>225</sup> There should be an emphasis on seed production and preservation, irrigation, management of agriculture supply and value chains.
- The government should refrain from imposing high taxes on farmers. They already have high labour and transportation costs and are already operating on thin margins.

### Livestock

- Incentivize an increased commercialization of other small livestock like poultry, goats and sheep through financial incentives or through educational programmes.
- Create programmes to help improve animal health services, as disease is rising among livestock, partly due to large-scale migrations.
- Subsidize supplements to be given to animals.
- Create programmes to teach better animal husbandry practices.
- Encourage non-indigenous breeding of animals to improve productivity.
- Increase the number of livestock markets.

### Construction

- Encourage large foreign investment to help build the construction industry in addition to major government investment in the industry. There is a substantial amount of need for infrastructure

<sup>225</sup> South Sudan Food Security and Livelihoods Cluster. (2017). Mission report to Wau in former WBEG and the State FSL cluster: February 13-15th 2017. Retrieved from [http://fscluster.org/sites/default/files/documents/final\\_mission\\_report\\_to\\_wau\\_beg\\_state\\_fsl\\_cluster\\_17\\_february\\_2017.pdf](http://fscluster.org/sites/default/files/documents/final_mission_report_to_wau_beg_state_fsl_cluster_17_february_2017.pdf)

in South Sudan. The construction industry is well-positioned to provide jobs and much-needed infrastructure work in South Sudan through investing in infrastructure development (e.g., supply of goods, plants or technical training for potential employees). These are, however, complex long-term goals which could be complemented with smaller scale repairs and constructions of key roadways, along with trainings for construction work, in the short-term.

- Invest in light manufacturing as this would employ a large number of workers and enable South Sudan to produce a substantial number of products given the high connectedness between products tied to light manufacturing.<sup>226</sup> At the very least, an increase in manufacturing and construction would have a major impact on the domestic market in South Sudan providing a large number of jobs and in-demand products like roads and machinery.
- Finally, a heavy investment in roads and agriculture in the longer-term could help create a strong export industry. There is substantial fertile land and more than enough farmers to do the work. If transportation costs could decline with better roads and productivity could increase with better farming practices and more fertile land, South Sudan could certainly become a strong exporter of certain agricultural products.

### General VT Recommendations

Within the general recommendations, first there are suggestions related to the accessibility of VTs, then design, relevance and effectiveness of trainings followed by recommendations for youth-focused TVET/VT/skills development programming. This is followed by recommendations to improve the effectiveness and efficiency of vocational training providers in general.

#### *With regard to accessibility of trainings:*

- Increase awareness about technical and vocational training opportunities through well-planned outreach campaigns. Explore ways to reach out to youth by placing notices in areas frequented by youth, such as community centres, sports centres, churches, cafes and restaurants, job boards, social media networks or even making announcements via radio or handing out flyers at festivals, markets and social gatherings. Candidates of primary grade level eight including those of ALP and Senior four should also be included in the outreach, to raise their awareness about the option to take TVET/VT/skills development courses as opposed to continue with the academic route. Communicate success stories of VT graduates, especially of women, to youth while providing a clear, realistic picture of the potential for success and expected level of hard work. Industry visits and exchanges with professionals showcasing their products/services could also be useful to attract potential trainees. Also, young people should be targeted along with their families through the outreach and awareness activities. This is key to building on the positive outlook youth have about VTs and motivating them to enter and complete VT programmes with support and encouragement from their families.

#### *With regard to selection of courses to be offered:*

- Adopt a demand-driven approach to determining priority trades. It is important to match the high consumer demand for goods and services against the skills deficit experienced by

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<sup>226</sup> A quick look at the product space analysis of any country will show how many goods are closely tied to light manufacturing. See the Harvard University (2018). Atlas of Economic Complexity. Accessible via <http://atlas.cid.harvard.edu/>

businesses to maximise the employment avenues of VT graduates. Consulting a variety of sources such as directors of local TVET/VT/skills development centres, labour union representatives, heads of chambers of commerce and local government officials can be a helpful triangulation exercise prior to developing project proposals. If implementation is delayed, it is advisable to conduct light-touch and targeted needs assessments prior to programme implementation because the market place dynamics are changing rapidly in South Sudan due to high mobility of people and the volatile security and political environment.

- Based on the widespread consumer dissatisfaction with availability of certain products and services, skills training with a focus on core techniques for beginners is recommended in driving, photography and videography. The following trades are recommended for skills training with a focus on cost-reduction and/or quality-improvement of incumbent products/services: agriculture (mechanised), agriculture (subsistence), hairdressing, beautician, catering, computers/ICT, construction work, dairy farming, dobbi/dry cleaning, systems installations, appliance repair, solar panel installation and repair, food preparation/processing, generator repair, auto mechanic, healthcare (doctor/nurse), honey production, leather work, livestock management (herding/selling), boda mechanic, poultry farming, plumbing, shoe repair, printing and design, soap and beauty item fabrication, auto spare parts production, wood works, tailoring and fashion design, welding and metal fabrication, masonry, mobile charging services (solar and generator), books and stationary fabrication and medicine production. Finally, based on the high satisfaction reported by consumers, it appears that the trades of arts and craft, fish farming and processing and bicycle mechanic have limited scope in the markets (on a national level), and therefore these can be accorded lower priority when selecting VT programmes on offer. A detailed analysis is given in Annex 3. It is important to keep in mind that these trends might differ from region to region as demonstrated in the location-specific trade recommendations given further ahead in this section.
- Vocational trainings which help youth produce food items and soap should be prioritised as these were reported by youth to comprise the majority of their expenditures. The value chain of these items should be examined to identify bottlenecks (e.g., high overhead transport and storage costs) and resolve them, as consumers have demonstrated a high willingness and ability to purchase these. For other items and services for which consumers have a high willingness and low ability to afford, such as tailoring, appliance repair, meat and restaurants, attention should be paid towards supporting demand-generation when pushing supply given the financial barriers faced by all. Consideration towards development of quality products should also be considered as noted in this study of the low quality of local products (i.e., footwear and clothes).
- There is untapped potential that should be leveraged to stimulate market growth. For instance, the potential to put in place collaborations between VTCs and UN/NGO agencies which procure items from abroad to provide in-kind assistance in South Sudan should be explored. If trainees are able to produce humanitarian assistance items such as soap, washing powder, shelter material, food items and/or mosquito nets locally, at scale, this will help provide an income to youth and could lower costs for humanitarian agencies. Local production could help lower the high transport costs incurred especially during the wet season to procure items from the neighbouring countries and ease the transport of goods if they were to be moved locally within

South Sudan rather than from abroad. Other ideas could include looking at large-scale government and private sector procurements for goods and services which require low investment and easily trainable skills.

- Youth, especially women<sup>227</sup> should be better equipped to fully utilize the power of web and orient the youth towards productive uses of internet. The assessed youth identified ICT/computer training as a key recommended skill. Considering the requirements across sectors of staff requiring computer skills as a result of increased digitalisation and utilisation of online systems, it is essential that South Sudanese youth have these skills. This will require investment in basic ICT and office-based skills as well as more advanced ICT skills, such as web design and application development. Equipping youth with the skills to fully utilise the internet and online platforms will also enable them to access the many online learning platforms and courses, fundraising platforms and e-commerce as well as youth advocacy networks and technical and communications experts. Finally, youth can then access an entirely new market, that of freelance jobs, both online and offline, reducing the dependency on their local market. However, tips on how to use the internet safely should be a key component of this training.

*With regard to design and content of the trainings:*

- Literacy levels are very low. Therefore, basic literacy and numeracy classes should be included in vocational training programmes. This would improve the skills of those who already have a basic foundation and provide a foundation for those who are completely illiterate. Similarly, design new training programmes to offer an additional comprehensive skills package of literacy, numeracy, life skills and employability skills which complement the core skill being taught.
- In addition to technical trainings, introduce soft skills training with a focus on inculcating customer service skills, inter-personal skills, and communication and team work skills to improve the employability of youth. This was reported widely by businesses as a priority need for youth. Including peacebuilding skills as part of the soft skills will also enable smooth integrations in TVET/VT/skills development and reduce tension that may be perceived due to the polarised ethnicity issues the country is facing.
- Invest in skills training along the various steps of the agricultural value chain for grains such as millet, wheat and sorghum as these continue to be in high demand across South Sudan. Spread out agricultural trainings to cover different processing methods so that groups of youth are trained in cleaning, drying, blending and storage of grains as well as flour, feed milling and packaging. This will help strengthen value chains and inject more diverse skills into the local market, which go beyond grain production. For a holistic view of a sample agricultural value chain for wheat, please see Annex 4.
- Knowledge in almost all areas of seed production is lacking. Given the unpredictable weather conditions of the region, transport costs are extensive as well. Thus, in addition to seed production trainings, consider providing adequate warehouse or storage facilities in the place of sale to reduce the burden of transportation during unfavourable weather conditions.

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<sup>227</sup> As women were found to be less likely than men to use internet in this study



- Currently, various TVET/VT/skills development centres use different curricula which may come from NGOs/other countries or even be developed individually by the TVET/VT/skills development centre staff. Acknowledging the significant time and efforts required, it is highly recommended to undertake curriculum harmonisation and take into account the curricula designed by MoLPSHRD, MoGEL and NGOs as opposed to individuals.

*With regard to support during and post trainings:*

- Measures to offer childcare or creche facilities should be devised in the TVET/VT/skills development centres as this has a substantial impact on the ability of women to enter and complete VTs. Additionally, establishing on-campus shops which sell inputs, stationary items and basic food and non-essential items can assist trainees by facilitating access to these items. Youth have also indicated the desire to have health facilities on campus. Thus, the possibility of coordinating with local health service providers to provide a weekly “drop-in” service for youth at the centre should be explored. Donors could also consider extending support for light construction or rehabilitation of small clinics, bathrooms or workshops to further improve the infrastructural offerings to trainees.
- Insecurity and violence due to conflict is a serious concern for trainees attending VT programmes in Wau, Juba and Fangak. Thus, adequate security mitigation measures should be considered to ensure that they are able to offer a safe and secure environment for trainees to study without disruption. VT providers can look at radio or web (where available) based dissemination of a portion of courses or develop contingency plans, such as take-home assignments, to prevent disruption of training in the event that the security situation worsens.
- A significant proportion of youth have reported difficulties in starting a business or obtaining employment, especially post VT, due to a lack of tools and/or start-up capital. Thus, provision of toolkits to trainees should be prioritised in the following VT programmes: hairdressing, blacksmith and appliance repair. A combination of toolkits and start-up capital or loans should be provided for: agriculture (mechanised), agriculture (subsistence), animal healthcare, business (marketing), catering, carpentry and joinery, computers/ICT, dobbi/dry cleaning, generator repair, healthcare (doctor/nurse), mobile charging services (solar and generator), mechanic – bicycle and mechanic – boda. A detailed list can be found in Annex 3.
- Improvements in stable financial assistance are key to solving unemployment and loss-incurring businesses as difficulty in accessing funds to start, run and expand businesses was expressed in all three surveys (vendors, consumers and youth). Therefore, efforts should be concentrated on easing access to capital or micro-loans for youth interested in starting businesses, accompanied with regular follow up and business guidance. The success of DORCAS in establishing a micro-savings group scheme for youth in Wau demonstrates the potential for such community-based approaches despite the high competition, low willingness to share success stories and general suspicion on tribal lines in the job-seeking environment.
- Career counselling should be provided as a means to help better orient youth in terms of job search and preparedness. Topics of counselling can include how to identify a domain of interest, aptitude testing, information about how and where to seek job opportunities, interviewing

skills, CV development and related topics. This will also help alleviate the sense of helplessness observed amongst youth as a result of high unemployment and low job prospects.

*With regard to efficiency and performance of training providers:*

- A tracking system should be established to monitor progress of graduates, to learn about how they cope with the job environment, the types of obstacles they face and the ways in which the VTC learning helps them to overcome those challenges. This is key for VT providers to obtain a deeper understanding of the business context in South Sudan. Most importantly, these lessons learned can then inform iterations and adaptations of TVET/VT/skills development programming for next cohorts. Tracking and follow-up would also ensure financial and material support such as toolkits and other inputs are used appropriately and not wasted.
- Consider providing a “total package” to youth, which includes technical and soft skills trainings, start-up support in the form of capital, tools and guidance, potentially refresher trainings further in time and most importantly, continued monitoring after they have graduated. The follow-up in the initial months can help realize the full potential of the skills training efforts by accompanying youth in their transition from training to employment and guiding them to overcome the initial barriers they may face. NGOs can consider advocating for slightly longer term funding to donors in order to make this happen, potentially undertaking pilot programmes to show a proof of concept. Staggered release of funding to youth entrepreneurs can also be considered to help ensure youth remain committed to their efforts.
- An ability to enjoy the work of choice was one of the top factors influencing trade preferences of youth. Motivation should be assessed when evaluating entry applications for VT programmes as this can help reduce the likelihood of drop out and maximise chances of successful training participation. A selection of trades of interest to youth is given in the location-wise recommendations below.

*With regard to linkages with the private sector:*

- Direct linkages with employers are an essential aspect for successful TVET/VT/skills development programming. Buy-in of employers is crucial to ensure that the VTs are relevant (through employer consultations), meet the needs and norms of the industry (through collaborative curriculum development) and that VT graduates are absorbed into the local labour market (through priority hiring of VT graduates and internships). VT providers and funding mechanisms can consider incentivising the participation of employers by contributing to part of the salary or expenses incurred by a business to employ apprentices or interns from a VTC or finding other solutions which also helps ease access to finances for employers. Formal internships and apprenticeships, in particular, are currently very low compared to informal trainings youth receive from family-run businesses. Thus, professionalised internship opportunities for trainees could help them begin their careers, tap into social capital, and also build professional networks.
- Finally, the cultural attitudes at play should be acknowledged, in terms of preferential employment of members of one’s own tribe, family or locality. This is intrinsic to the South Sudanese cultural fabric and sometimes non-compliance (such as hiring from another region or

abroad) can lead to conflict. The recent attack in Maban by local youth on the offices of humanitarian agencies over lack of employment opportunities to local youth is one such example.<sup>228</sup> Thus, sensitization of businesses about fair and transparent recruitment procedures and human resource development is recommended albeit with provisions for mitigating risks of creating social tensions. For instance, medium to big sized businesses could be suggested to fill only a proportion of their planned hires with well-qualified VT trained employees. This can help reduce tensions and induce an organic transfer of skills within the employer business as well.

### Location-specific VT Recommendations

In addition to the recommendations detailed above which are applicable to all locations, there are also some suggestions which are location-specific.

#### Juba

- Based on businesses who have projected hiring of more than three persons in the near future, equip youth with skills in hairdressing, catering, hospitality, boda-mechanic, driving and printing in Juba.
- Tap into the interest expressed by Juba youth in trades such as office management, building and construction, computer/ICT and systems installations, and prioritize these for establishing linkages with the private sector.

#### Juba PoC

- Consider establishing a VT centre within the PoC which can offer basic business and computer courses, as PoC youth in Juba expressed an interest in these skills. Focus on providing guidance on the development of business plans as this is a major weakness for youth who have been able to put together some start-up capital on their own.
- Focus on awareness raising, outreach and information dissemination about training opportunities in the PoCs as youth, especially women, reported a lack of knowledge about training opportunities as a barrier to accessing VTs.
- Sensitize VTC administration and business owners about the value addition and skills transfer potential PoCs stand to offer if given a chance to work alongside local youth.

#### Bor

- Based on businesses who have projected hiring of more than three persons in the near future, consider prioritizing trainings in hospitality, mobile charging, boda mechanic and welding.
- Driving and catering businesses were reported by youth to be flourishing in Bor due to the heavy presence of NGOs. Thus, the availability of jobs in these two domains should be verified and the relevant skills training subsequently provided.
- There is a specific demand for local seed production in Bor and VT centres can look into coordinating with local NGO's to set up agri-businesses.

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<sup>228</sup> NGO Forum. (2018). *The South Sudan NGO Forum strongly condemns the violent attacks against humanitarian aid agencies in Maban*. Accessible via. <https://reliefweb.int/report/south-sudan/south-sudan-ngo-forum-strongly-condemns-violent-attacks-against-humanitarian-aid>

### Fangak

- Based on businesses who have projected hiring of more than three persons in the near future, consider prioritizing trainings in mobile charging and retailer businesses.
- A lack of knowledge is one of the barriers, besides poor pay and lack of interest, to pursue employment in subsistence agriculture. Prioritizing agriculture trainings in Fangak is therefore suggested.
- Modules which can be taken online (where internet access is available or can be arranged) or over radio (where access is present) should be developed to ensure that trainings are not disrupted in locations which are volatile and prone to conflict. Alternatively, ensure trainees are equipped with learner guides and home assignments when regular classes are disrupted.
- Like in Bor, there is potential to set up agro-input businesses given that 100% of all seeds were procured by consumers from NGOs. There is unmet demand for seeds in Fangak, and therefore there is also scope for improving NGO efficiency, for instance by increasing supply, providing incentives to buy more seeds in order to cover supply costs.

### Twic

- Based on businesses who have projected hiring of more than three persons in the near future, consider prioritizing trainings in carpentry, retailer, beautician, hospitality, boda mechanic, hairdressing and driving.
- A majority of Twic youth want technical and business training as well as toolkits, unlike other locations where youth prioritize start-up capital support. Therefore, there should be a focus on skills training provision in Twic.
- Youth in Twic believe carpentry, ox-plough agriculture and marketing can help provide income. Thus, prioritize these domains in Twic is suggested.

### Wau PoC

- Based on businesses outside of the PoC who have projected hiring of more than three persons in the near future, consider prioritizing trainings in hairdressing, catering, appliance repair, mobile charging, hospitality, retailer and driving.
- The interest expressed by Wau PoC youth in trades such as hairdressing, food processing and agriculture should be harnessed by providing VT programmes in these domains.
- PoCs are intended to be in a temporary residency. Thus, explore the general recommended trades across locations so these skills can be gained by IDPs and applied even once they move.
- Modules which can be taken online (where internet access is available or can be arranged) or over radio should be developed to ensure that trainings are not disrupted in Wau PoC as this is a location where the security situation is volatile and where violence is prevalent.
- In the PoC, VT providers should consider the specific barriers faced by IDPs to enter and complete VT programmes. For instance, admission policy should be adapted to recognize that IDPs may have missing or lost documentation, and trainers and VTC administration should be sensitised to treat all students in a fair and respectful manner.
- The reasons behind the observed low willingness of women in Wau PoC to work in trades not considered suitable for women should be explored in more depth. Depending on the barriers reported, consider sensitization and stakeholder engagement strategies in future TVET/VT/skills development programmes in Wau to increase possibilities for women. This could include

providing life skills lessons and awareness raising sessions which feature success stories of other women from within the community.

#### Kwajok

- Fish farming training should be offered to encourage the implementation of fresh fish stalls in Kwajok while not contributing towards overfishing off the coast.
- Agricultural training should be provided to returnees with a focus on methods that maximizes the utility of small plots of land.
- Training should be implemented in poultry raising both for the production of chicken meat and for that of eggs. Linkages should be explored with restaurants in Kwajok as chicken is currently nearly twice as expensive as beef in some restaurants.
- Trainings should be offered in appliance repair, concentrating on mobile phones and electrical equipment, particularly to serve the burgeoning mobile phone market.

#### Lainya

- Local oil production methods should be explored as there is a high demand for oil in the market in Lainya. 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.
- 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 languages becomes a crucial factor in the creation of opportunity. Therefore, language training courses in English and Juba Arabic should be offered.

#### Twic East

- Provision of VT in subsistence agriculture and animal healthcare should be given.
- General recommendations should be applied as Twic East has a greater number of IDPs than other locations in the former state of Jonglei.
- Youth should be trained in alternative income generation activities and secondary income sources as currently the population either works in agriculture or has no source of income at all.

#### Pibor

- Local communities should be supported to learn about ongoing or planned community infrastructural projects (for example, regarding road building) to explore possibilities to provide relevant trainings for youth in the community.

#### Duk

- Local communities should be supported to learn how to improve roadways which can address the infrastructure gaps while supporting an income generating activity.
- Youth should be trained and guided in the formation of business co-operatives such that they can combine their individual skillsets in an effort to maximise the income generated and create

self-sustaining businesses which are not dependent on seasons.

## Annex 1 – List of products and services in markets, by location

Table 45: Type of products sold in each market

Products	Juba (N=20)	Fangak (N=32)	Twic (N=23)	Wau (N=16)	Bor (N=19)	Total (N=110)
Consumer goods/general store	25.0%	28.1%	30.4%	25.0%	36.8%	29.1%
Accessories	0.0%	3.1%	0.0%	0.0%	5.3%	1.8%
Agricultural tools	0.0%	0.0%	0.0%	0.0%	5.3%	0.9%
Animal fats & cooking oils	0.0%	3.1%	8.7%	12.5%	5.3%	5.5%
Bread (freshly baked)	5.0%	0.0%	4.4%	0.0%	0.0%	1.8%
Butter	0.0%	0.0%	0.0%	6.3%	0.0%	0.9%
Charcoal	10.0%	3.1%	0.0%	6.3%	10.5%	5.5%
Chicken/Goat/Livestock	0.0%	0.0%	8.7%	0.0%	0.0%	1.8%
Cloth & Sewing Items	5.0%	6.3%	4.4%	0.0%	0.0%	3.6%
Clothes & Footwear - local	5.0%	6.3%	0.0%	0.0%	0.0%	2.7%
Clothes & Footwear - imported	10.0%	34.4%	13.0%	6.3%	0.0%	15.5%
Clothes & Footwear – 2 <sup>nd</sup> hand	10.0%	3.1%	0.0%	0.0%	0.0%	2.7%
Dried/smoked fish	0.0%	3.1%	4.4%	0.0%	10.5%	3.6%
Eggs	0.0%	0.0%	4.4%	0.0%	0.0%	0.9%
Fresh fish	0.0%	6.3%	4.4%	0.0%	5.3%	3.6%
Fruits/Vegetables/Nuts	10.0%	0.0%	4.4%	0.0%	10.5%	4.6%
Fruit products	0.0%	0.0%	4.4%	0.0%	5.3%	1.8%
Metal goods & furniture	0.0%	3.1%	0.0%	0.0%	5.3%	1.8%
Meat	0.0%	0.0%	4.4%	0.0%	5.3%	1.8%
Milk products	5.0%	0.0%	0.0%	0.0%	10.5%	2.7%
Prepared food products	0.0%	3.1%	4.4%	0.0%	5.3%	2.7%
Spare parts for bikes/cars	10.0%	3.1%	0.0%	0.0%	0.0%	2.7%
Staples (grains, sugar, salt)	10.0%	9.4%	13.0%	0.0%	0.0%	7.3%
Soap & washing powder	0.0%	21.9%	8.7%	12.5%	5.3%	10.9%
Straw & straw products	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Street/fast food (chapati, rolex, mandazi)	0.0%	3.1%	0.0%	6.3%	0.0%	1.8%
Toiletries & beauty items	0.0%	3.1%	4.4%	0.0%	0.0%	1.8%
Tools (agricultural & other)	0.0%	0.0%	0.0%	0.0%	5.3%	0.9%
Yogurt	5.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Bed articles (mattress/pillow)	0.0%	3.1%	0.0%	0.0%	0.0%	0.9%
Beverages (non-alcoholic)	0.0%	0.0%	0.0%	6.3%	0.0%	0.9%
Bicycles	0.0%	0.0%	0.0%	6.3%	0.0%	0.9%
Books & stationary	0.0%	0.0%	0.0%	6.3%	0.0%	0.9%
Electronics	5.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Household appliances	5.0%	0.0%	0.0%	0.0%	0.0%	0.9%

Products	Juba (N=20)	Fangak (N=32)	Twic (N=23)	Wau (N=16)	Bor (N=19)	Total (N=110)
Pharmaceuticals	0.0%	0.0%	13.0%	0.0%	5.3%	3.6%
Plastic products	0.0%	0.0%	0.0%	12.5%	5.3%	2.7%
Solar panels/chargers	0.0%	3.1%	0.0%	0.0%	0.0%	0.9%
Spirits/alcohol	0.0%	0.0%	0.0%	6.3%	0.0%	0.9%
Other	15.0%	28.1%	4.4%	37.5%	5.3%	18.2%

\*Other comprised mainly of an assortment of credit providers, mobile sim sellers, cement and hardware sellers



Table 46: Type of Services Sold in Each Market

Services	Juba (N=16)	Fangak (N=4)	Twic (N=13)	Wau (N=20)	Bor (N=17)	Total (N=70)
Appliance repair	0.0%	0.0%	0.0%	10.0%	5.9%	4.3%
Baker	6.3%	0.0%	0.0%	0.0%	0.0%	1.4%
Barber/hairstylist	6.3%	0.0%	7.7%	5.0%	5.9%	5.7%
Beautician	0.0%	0.0%	7.7%	0.0%	0.0%	1.4%
Carpenter	6.3%	0.0%	7.7%	0.0%	0.0%	2.9%
Catering/cook	6.3%	0.0%	0.0%	5.0%	0.0%	2.9%
Collect water	0.0%	0.0%	0.0%	5.0%	0.0%	1.4%
Construction work	0.0%	0.0%	0.0%	0.0%	5.9%	1.4%
Dobbi/clothes washing	0.0%	0.0%	15.4%	0.0%	0.0%	2.9%
Driver - Boda Boda	0.0%	0.0%	0.0%	5.0%	0.0%	1.4%
Electrician	0.0%	0.0%	0.0%	5.0%	0.0%	1.4%
Hotel/hospitality services	6.3%	0.0%	0.0%	0.0%	5.9%	2.9%
ICT/Computer services	6.3%	0.0%	0.0%	0.0%	0.0%	1.4%
Mason/Brick layer	0.0%	0.0%	0.0%	0.0%	5.9%	1.4%
Mobile charging	0.0%	25.0%	0.0%	5.0%	11.8%	5.7%
Mechanic/car or Boda repair	6.3%	0.0%	7.7%	0.0%	5.9%	4.3%
Printing and design	6.3%	0.0%	0.0%	0.0%	0.0%	1.4%
Purchasing (wholesale)	0.0%	75.0%	15.4%	5.0%	0.0%	8.6%
Restaurant/bar	6.3%	0.0%	7.7%	5.0%	5.9%	5.7%
Split rocks	0.0%	0.0%	0.0%	0.0%	5.9%	1.4%
Tailor	0.0%	0.0%	0.0%	5.0%	17.6%	5.7%
Tea shop	6.3%	0.0%	15.4%	10.0%	11.8%	10.0%
Trainings	0.0%	0.0%	0.0%	15.0%	0.0%	4.3%
Transport and logistics	37.5%	0.0%	7.7%	10.0%	0.0%	12.9%
Welding	0.0%	0.0%	7.7%	0.0%	5.9%	2.9%
Refuse to Answer	0.0%	0.0%	0.0%	10.0%	5.9%	4.3%

## Annex 2 - Assessment of Skills in Demand in Each Sector

TRADE / SECTOR	From CDS Consumer demand for products/services (High / Medium / Low / Cannot say)	From MOS Availability of jobs (High / Medium / Low / Cannot say)	From YSS Availability of labour (Yes / No / Cannot say)	Recommendation Is the vocation in demand of skills? (Skills in demand / Cannot say)
1 Agriculture – mechanised	Medium demand	Cannot say	Yes	Skills in demand
2 Agriculture - ox plough	Cannot say	Cannot say	Yes	Cannot say
3 Agriculture - subsistence/manual	Medium demand	Medium	Yes	Skills in demand
4 Animal healthcare	Cannot say	Cannot say	Yes	Cannot say
5 Arts and crafts	Medium demand	Cannot say	Yes	Skills in demand
6 Barber/hairdresser	Medium demand	High	Yes	Skills in demand
7 Beautician	High demand	High	Cannot say	Cannot say
8 Blacksmith	Cannot say	Cannot say	Yes	Cannot say
9 Business - entrepreneurship/management	Cannot say	Cannot say	Yes	Cannot say
10 Business - finance/accounting/numeracy	Cannot say	Cannot say	Cannot say	Cannot say
11 Business - marketing	Cannot say	Cannot say	Yes	Cannot say
12 Catering	Medium demand	Medium	Yes	Skills in demand
13 Carpentry and joinery	Cannot say	High	Yes	Skills in demand
14 Computers/ICT	Medium demand	Low	Yes	Skills in demand
15 Building and construction site labourer	Medium demand	Low	Yes	Skills in demand
16 Dairy farming	Medium demand		Cannot say	Cannot say
17 Dobbi/dry cleaning	Medium demand	High	Yes	Skills in demand
18 Electronics – systems installations	Medium demand	High	Yes	Skills in demand
19 Electronics – appliance repair	Medium demand	Medium	Yes	Skills in demand
20 Electronics – solar panel installation and repair	Medium demand	Cannot say	Cannot say	Cannot say

		From CDS	From MOS	From YSS	Recommendation
21	Events management	Cannot say	Cannot say	Cannot say	Cannot say
22	Fish farming and processing	Medium demand	High	Cannot say	Cannot say
23	Food preparation/processing	Medium demand	Medium	Cannot say	Cannot say
24	Generator repair (auto-mechanics)	Medium demand	Cannot say	Yes	Skills in demand
25	Healthcare (doctor/nurse)	Medium demand	Cannot say	Yes	Skills in demand
26	Hospitality services (hotel/restaurant/bar)	Medium demand	High	Cannot say	Cannot say
27	Honey production / bee-keeping	Medium demand	Cannot say	Cannot say	Cannot say
28	Leather work	High demand	Cannot say	Yes	Skills in demand
29	Literacy – English	Cannot say	Cannot say	Yes	Cannot say
30	Literacy – Arabic	Cannot say	Cannot say	Cannot say	Cannot say
31	Literacy – other language	Cannot say	Cannot say	Cannot say	Cannot say
32	Life skills (gender/nutrition and health/peacebuilding)	Cannot say	Cannot say	Yes	Cannot say
33	Life skills (communications, team work, critical thinking, leadership)	Cannot say	Cannot say	Yes	Cannot say
34	Livestock management (herding/selling)	High demand	Cannot say	Yes	Skills in demand
35	Masonry	Medium demand	High	Yes	Skills in demand
36	Mobile charging services (solar and generator)	High demand	High	Yes	Skills in demand
37	Mechanic – Auto	Cannot say	Cannot say	Yes	Cannot say
38	Mechanic – Bicycle	Medium demand	High	Yes	Skills in demand
39	Mechanic – Boda	Medium demand	High	Yes	Skills in demand
40	Office administration and secretarial work	Cannot say	Cannot say	Cannot say	Cannot say
41	Poultry farming	Medium demand	Cannot say	Yes	Skills in demand
42	Plumbing	Medium demand	Cannot say	Yes	Skills in demand
43	Retailer/general trader	Cannot say	Low	Cannot say	Cannot say
44	Shoe repair	Medium demand	Cannot say	Cannot say	Cannot say

		From CDS	From MOS	From YSS	Recommendation
45	Tailoring and fashion design	High demand	Medium	Cannot say	Cannot say
46	Welding and metal fabrication	High demand	High	Cannot say	Cannot say
48	Counselling	Cannot say	Cannot say	Cannot say	Cannot say
49	Demining	Cannot say	Cannot say	Cannot say	Cannot say
50	Driving	Medium demand	Medium	Cannot say	Cannot say
51	Photography or videography	Medium demand	Cannot say	Cannot say	Cannot say
52	Printing and design	Medium demand	Low	Cannot say	Cannot say
53	Soap and beauty item fabrication	High demand	High	Cannot say	Cannot say
54	Auto spare parts production	Medium demand	Low	Cannot say	Cannot say
55	Wood works	Medium demand	Cannot say	Cannot say	Cannot say
56	Boats and canoe repair/fabrication	Cannot say	Cannot say	Cannot say	Cannot say
57	Books and stationary fabrication	High demand	Cannot say	Cannot say	Cannot say
58	Medicine production	Medium demand	High	Cannot say	Cannot say
59	Plastic products	Cannot say	High	Cannot say	Cannot say
60	Specialised consumer goods (sports equipment, sounds and speakers, mobile phones and accessories)	Medium demand	Cannot say	Cannot say	Cannot say

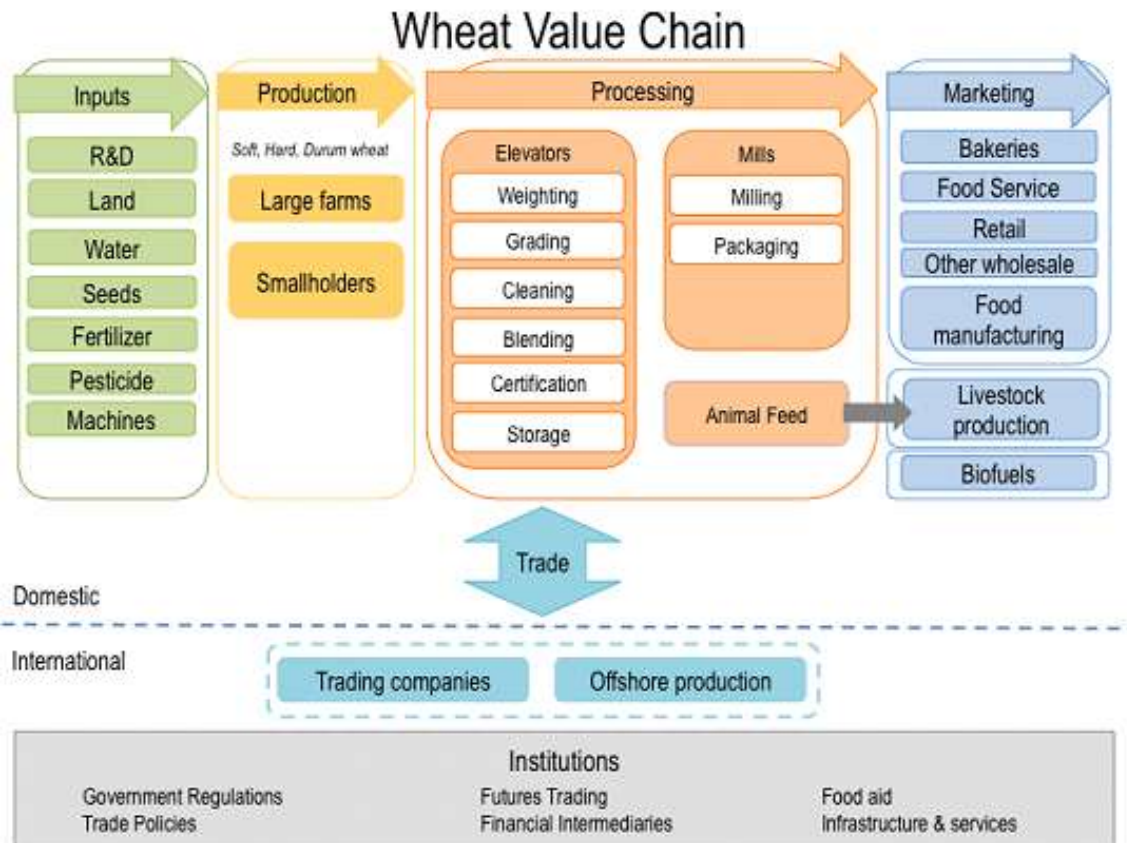
### Annex 3 - Type of TVET/VT/Skills Development and Support Recommended

	TRADE / SECTOR	From CDS	From CDS	From YSS
		Training recommended (Yes / Limited scope / Cannot say)	Type of training recommended (Core skills / Advanced - Cost-effectiveness & Quality focus)	Other support required, as per survey respondents (Tools / Start-up loans )
1	Agriculture – mechanised	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
2	Agriculture - ox plough	Cannot say	Cannot say	
3	Agriculture - subsistence/manual	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
4	Animal healthcare	Cannot say	Cannot say	Toolkits, Start-loans
5	Arts and crafts	Limited scope for VT	Cannot say	Cannot say
6	Barber/hairdresser	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits
7	Beautician	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
8	Blacksmith	Cannot say	Cannot say	Toolkits
9	Business - entrepreneurship/management	Cannot say	Cannot say	Cannot say
10	Business - finance/accounting/numeracy	Cannot say	Cannot say	Cannot say
11	Business - marketing	Cannot say	Cannot say	Toolkits, Start-loans
12	Catering	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
13	Carpentry and joinery	Cannot say	Cannot say	Toolkits, Start-loans
14	Computers/ICT	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
15	Building and construction site labourer	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
16	Dairy farming	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
17	Dobbi/dry cleaning	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
18	Electronics – systems installations	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
19	Electronics – appliance repair	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits
20	Electronics – solar panel installation and repair	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say

		From CDS	From CDS	From YSS
21	Events management	Cannot say	Cannot say	Cannot say
22	Fish farming and processing	Limited scope for VT	Cannot say	Cannot say
23	Food preparation/processing	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
24	Generator repair (auto-mechanics)	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
25	Healthcare (doctor/nurse)	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
26	Hospitality services (hotel/restaurant/bar)	Cannot say	Cannot say	Cannot say
27	Honey production / bee keeping	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
28	Leather work	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
29	Literacy – English	Cannot say	Cannot say	Toolkits, Start-loans
30	Literacy – Arabic	Cannot say	Cannot say	Cannot say
31	Literacy – other language	Cannot say	Cannot say	Cannot say
32	Life skills (gender/nutrition and health/peacebuilding)	Cannot say	Cannot say	Toolkits, Start-loans
33	Life skills (communications, team work, critical thinking, leadership)	Cannot say	Cannot say	Cannot say
34	Livestock management (herding/selling)	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
35	Masonry	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
36	Mobile charging services (solar and generator)	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
37	Mechanic – Auto	Cannot say	Cannot say	Cannot say
38	Mechanic – Bicycle	Limited scope for VT	Cannot say	Toolkits, Start-loans
39	Mechanic – Boda	Yes	Advanced-Cost-effectiveness & Quality focus	Toolkits, Start-loans
40	Office administration and secretarial work	Cannot say	Cannot say	Cannot say
41	Poultry farming	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
42	Plumbing	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
43	Retailer/general trader	Cannot say	Cannot say	Cannot say
44	Shoe repair	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say

		From CDS	From CDS	From YSS
45	Tailoring and fashion design	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
46	Welding and metal fabrication	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
48	Counselling	Cannot say	Cannot say	Start-loans
49	Demining	Cannot say	Cannot say	Toolkits, Start-loans
50	Driving	Yes	Introductory core skills training	Cannot say
51	Photography or videography	Yes	Introductory core skills training	Cannot say
52	Printing and design	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
53	Soap and beauty item fabrication	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
54	Auto spare parts production	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
55	Wood works	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
56	Boats and canoe repair/fabrication	Cannot say	Cannot say	Cannot say
57	Books and stationary fabrication	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
58	Medicine production	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say
59	Plastic products	Cannot say	Cannot say	Cannot say
60	Specialised consumer goods (sports equipment, sounds and speakers, mobile phones and accessories)	Yes	Advanced-Cost-effectiveness & Quality focus	Cannot say

Annex 4 – Wheat Value Chain Snapshot<sup>229</sup>



<sup>229</sup> Duke University. *Global Value Chain Analysis – Wheat GVC*. Retrieved from <https://sites.duke.edu/minerva/the-global-value-chain/> on 6 October 2018.



## Annex 5 – Trades Preferred by Youth by Location

Trade in which youth would like to work in	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Agriculture – mechanised	13.9%	33.3%	2.8%	0.0%	5.6%	11.1%
Agriculture - ox plough	5.6%	16.7%	2.8%	0.0%	0.0%	5.0%
Agriculture - subsistence/manual	5.6%	25.0%	11.1%	2.8%	22.2%	13.3%
Animal healthcare	0.0%	2.8%	0.0%	0.0%	11.1%	2.8%
Arts and crafts	5.6%	0.0%	11.1%	0.0%	0.0%	3.3%
Barber/hairdresser	11.1%	11.1%	5.6%	19.4%	5.6%	10.6%
Beautician	11.1%	11.1%	2.8%	2.8%	16.7%	8.9%
Blacksmith	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Business - Entrepreneurship/Management	22.2%	22.2%	8.3%	41.7%	8.3%	20.6%
Business - Finance/Accounting/Numeracy	13.9%	8.3%	8.3%	0.0%	16.7%	9.4%
Business- Marketing	27.8%	19.4%	16.7%	2.8%	25.0%	18.3%
Catering (incl. bakery/pastry/pizza making)	8.3%	11.1%	0.0%	0.0%	5.6%	5.0%
Carpentry and joinery	5.6%	13.9%	13.9%	5.6%	2.8%	8.3%
Computers/ICT	19.4%	11.1%	11.1%	8.3%	8.3%	11.7%
Building and construction site labourer	13.9%	13.9%	11.1%	0.0%	2.8%	8.3%
Dairy farming	2.8%	0.0%	0.0%	2.8%	0.0%	1.1%
Dobbi/Dry cleaning	0.0%	2.8%	0.0%	0.0%	0.0%	0.6%
Electronics – systems installations	19.4%	2.8%	0.0%	5.6%	0.0%	5.6%
Electronics – appliance repair	8.3%	5.6%	0.0%	2.8%	0.0%	3.3%
Electronics – solar panel installation and repair	5.6%	2.8%	0.0%	5.6%	0.0%	2.8%
Events management	0.0%	2.8%	0.0%	0.0%	0.0%	0.6%
Fish farming and processing	0.0%	5.6%	0.0%	0.0%	2.8%	1.7%
Food preparation/processing	5.6%	11.1%	0.0%	8.3%	0.0%	5.0%
Generator repair (Auto-Mechanics)	5.6%	0.0%	2.8%	2.8%	0.0%	2.2%
Healthcare (doctor/nurse)	11.1%	8.3%	0.0%	2.8%	2.8%	5.0%
Hospitality services (hotel/restaurant/bar)	11.1%	13.9%	0.0%	5.6%	2.8%	6.7%
Honey production/beekeeping	0.0%	2.8%	0.0%	0.0%	0.0%	0.6%
Leather work	0.0%	2.8%	0.0%	2.8%	0.0%	1.1%
Literacy – English	5.6%	5.6%	5.6%	0.0%	5.6%	4.4%
Literacy – Arabic	0.0%	2.8%	0.0%	0.0%	0.0%	0.6%
Literacy – other language	0.0%	0.0%	0.0%	0.0%	2.8%	0.6%
Life skills (gender/nutrition & health/ peace building)	0.0%	8.3%	0.0%	5.6%	2.8%	3.3%
Life skills (communications, team work, critical thinking, leadership)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Livestock management (herding/selling)	0.0%	2.8%	0.0%	0.0%	11.1%	2.8%
Masonry	0.0%	2.8%	0.0%	5.6%	5.6%	2.8%
Mobile charging services (solar + generator)	2.8%	2.8%	5.6%	8.3%	0.0%	3.9%
Mechanic – Auto	0.0%	0.0%	22.2%	8.3%	2.8%	6.7%
Mechanic – Bicycle	2.8%	0.0%	8.3%	0.0%	0.0%	2.2%
Mechanic – Boda	5.6%	0.0%	5.6%	11.1%	2.8%	5.0%

Trade in which youth would like to work in	Juba (N=36)	Fangak (N=36)	Twic (N=36)	Wau (N=36)	Bor (N=36)	Total (N=180)
Office administration and secretarial work (general)	8.3%	2.8%	0.0%	2.8%	5.6%	3.9%
Poultry farming	0.0%	0.0%	0.0%	0.0%	2.8%	0.6%
Plumbing	2.8%	2.8%	0.0%	2.8%	0.0%	1.7%
Retailer/general trader	8.3%	2.8%	0.0%	5.6%	2.8%	3.9%
Shoe repair	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tailoring and fashion design	2.8%	0.0%	11.1%	8.3%	27.8%	10.0%
Welding and metal fabrication	0.0%	5.6%	8.3%	5.6%	2.8%	4.4%
Other (please specify)	5.6%	0.0%	0.0%	5.6%	2.8%	2.8%
Refuse to answer	0.0%	2.8%	0.0%	0.0%	0.0%	0.6%

## Annex 6 – Names of TVET/VT/Skills Development Centres Surveyed

No	Location	Name of Centre	Managed By	Year	Governance	Top 3 priorities in school plan	Source of funding
1	Juba	Multipurpose Training Centre (MTC)	Government Institute (MoLPSHRD)	1973	No	Training teachers, increasing variety of courses offered and increasing salary of teaching staff.	Trainee fees, Government, INGOs, UN.
2	Juba	Juba Technical Secondary School	Government Institute (MoGEI)	1958	Yes	Training teachers, increasing number of cohorts and increasing variety of courses offered.	Funds from NGOs, INGOs, or UN agencies
3	Juba	Juba PoC3 – Youth Education Pack (YEP) Centre A.	Community	2015	Yes	Funding for TVET/VT/skills development activities, water facilities and introduction of new TVET/VT/skills development course.	Funds from NGOs, INGOs, or UN agencies
4	Juba	Juba PoC3 – YEP Centre B	Community	2016	Yes	Funding for TVET/VT/skills development activities, water and toilet facilities and introduction of new TVET/VT/skills development course.	Funds from NGOs, INGOs, or UN agencies
5	Juba	Science, Technology, Maths & Engineers (STEM) Centre	University of Juba	2018	Yes	Recruitment of trainers, certified TVET/VT/skills development curriculums, TVET/VT/skills development teaching and learning materials.	Private foundation (STEM Synergy)
6	Juba	Women Empowerment	CBO	2008	Yes	Training teachers, increasing number of cohorts and increasing salary of teaching staff.	Funds from NGOs, INGOs, or UN agencies
7	Juba			2012	Yes		

No	Location	Name of Centre	Managed By	Year	Governance	Top 3 priorities in school plan	Source of funding
		Egypt Academy	Private Business			Training teachers, setting up graduate tracking system and increasing variety of courses offered.	Trainee fees, Funds from NGOs, INGOs, or UN agencies.
8	Juba	Divine Catering Centre	NGO	2012	No	Training teachers, setting up graduate tracking system and organizing job fairs.	Trainee fees, Funds from NGOs, INGOs, or UN agencies.
9	Juba	SSEPO VTC	Local NGO	2004	Yes	Training teachers, buying demonstration toolkits for trainers and providing start-up capital to graduates.	Trainee fees, Funds from NGOs, INGOs, or UN agencies
10	Juba	St. Vincent VTC	Church Funded	2009	Yes	Increasing variety of courses offered, increasing salary of non-teaching staff and building more workshops.	Funds from NGOs, INGOs, or UN agencies
11	Wau	Wau POC AA	IOM, and community leaders.	2016	Yes	Training of centre committee, recruitment and training of TVET/VT/skills development teachers, TVET/VT/skills development teaching and learning materials.	IOM
12	Wau	Ministry of Culture, Youth & Sport (MoCYS) Youth Centre	Government Institute (MoCYS)	1972	Yes	Training of centre committee, recruitment and training of TVET/VT/skills development teachers, TVET/VT/skills development teaching and learning materials.	Government

No	Location	Name of Centre	Managed By	Year	Governance	Top 3 priorities in school plan	Source of funding
13	Kuajok	St Joseph Youth Education Pack (YEP) Centre	Church, partners	2012	Yes	Training in additional TVET/VT/skills development courses, recruitment of teachers, provision of TVET/VT/skills development teaching and learning materials.	Church, NGOs.
14	Turali	Wuliu YEP centre	Church, partners	2012	Yes	Rehabilitation of fence and building, recruitment of teachers, TVET/VT/skills development teaching and learning materials.	Church, NGOs.
15	Wunrok	Youth Association Centre	Youth Association	2015	No	Construction of classrooms and structure, recruit of teachers, TVET/VT/skills development teaching and learning materials.	Youth Association Members
16	Wunrok	Wunrok RRC and Governor Centre	Government (RRC / Governor)	2009	Yes	Construction of temporary learning space, recruitment of teachers, TVET/VT/skills development teaching and learning material.	Government
17	Wunrok	Bhangrial Primary School	Government Institute (MoGEI)	2007	Yes	Train school management on TVET/VT/skills development, recruit TVET/VT/skills development teachers, TVET/VT/skills development teaching and learning materials.	Government
18	Mayen Abun	Mayen Abun Youth Centre	Youth Association	1945	Yes	Rehabilitation of old building, recruitment of TVET/VT/skills development teachers, TVET/VT/skills development teaching and learning materials.	Youth
19	Mayen Abun	Mayen Abun Secondary School	Government Institute (MoGEI)	2010	Yes	Train school management on TVET/VT/skills development, recruit TVET/VT/skills development teachers, TVET/VT/skills development teaching and learning materials.	Government
20	Old Fangak	Fangak Community Centre	Church	2004	Yes	Improving centre facilities, lobbying for funding, recruiting centre staff, training of learners.	Church

No	Location	Name of Centre	Managed By	Year	Governance	Top 3 priorities in school plan	Source of funding
21	Bor	Bor Christian Vocational Boarding School	Cristian Charity (Starfish foundation)	2015	Yes	Construction of classrooms to increase learners number, formation of school management and training, increase number of trades at the centre	Well-wishers and church
22	Bor	Bor Vocational Training Centre	Government Institute (MoLPSHRD)	2016	Yes	Additional courses to be trained, monitoring of training & graduates, curriculum development.	Government, NGOs
23	Pibor	Pibor Girls Primary School	Government Institute (MoGEI)	2005	None	Training of centre committee, recruitment and training of TVET/VT/skills development teachers, TVET/VT/skills development teaching and learning materials.	Government
24	Duk	Duk Anglican Church	Church-funded	2011	Yes	Construction of church and provision of equipment for workshop	Anglican Church of Duk
25	Duk	Padiet Primary School	Community	2011	Yes	Renovation of church, construction of fences and donation of benches to church	Community
26	Twic East	Pamot Vocational Training Centre	NGO	2001	Yes	Unable to respond	NGOs

## Annex 7 – Additional Qualitative Vocational Training Centre Assessments in Select Areas

The following findings were taken as secondary data from the Vocational Training Centre Assessment in the former states of Western Bahr -el Gazal (WBeG) Wau State & Warrap - Kuajok and Akon North for the The Skills Development project is a concerted effort by Dorcas, Edukans and Light for the World, with support from the European Union.

TRAINING FACILITY	QUALITY & RELEVANCE	ORGANISATIONAL & INSTITUTIONAL	TEACHING & LEARNING
<p>1. Wau Vocational Training Center (Wau)</p> <p>VTC is not Operational</p>	<ol style="list-style-type: none"> <li>1. Establish a track and trace system gather information from Labour Market and develop employer engagement systems</li> <li>2. Create graduate engagement feedback system</li> <li>3. Develop teacher refresher programmes including provision of English proficiency training.</li> <li>4. Review the curricula of all the existing courses .and developnew curricula for agriculture/horticulture and life skills program such as communication &amp; business management skills, mechanics, driving carpentry &amp; joinery, masonry, computer, tailoring English and literacy skills, parenting and childcare; reproductive health, disability and gender awareness</li> </ol>	<ol style="list-style-type: none"> <li>1. Explore ways of operationalising the VTC; through lobby with national stakeholders, state department of labour &amp; VTC management (sign MOU)</li> <li>2. Carry out capacity building of centre managers and instructors.</li> <li>3. Support in development of institutional policies namely; Finance, PWDs, Gender mainstreaming and employer engagement.</li> <li>4. Increase accessibility and facilities for PWDs as well creation of referral system for PWDs</li> </ol>	<ol style="list-style-type: none"> <li>1. Procure and repair existing teaching and learning material; (generator, welding machines, office equipment)</li> <li>2. Improve on enrolment of students</li> <li>3. Develop performance appraisal for teachers</li> <li>4. Establish apprenticeship program and linkages to the labour market.</li> <li>5. Integrate life skills training; peace and reconciliation, parenting and childcare; reproductive health, disability and gender awareness</li> </ol>
<p>2. Don Bosco (Wau)</p>	<ol style="list-style-type: none"> <li>1. Develop a track and trace to gather information from Labour market.</li> </ol>	<ol style="list-style-type: none"> <li>1. Establish network of VETs and participate in harmonisation of VETs curriculum of all the trades</li> </ol>	<ol style="list-style-type: none"> <li>1. Improve teachers' refresher programmes</li> <li>2. provide learning facilities for PWDs</li> </ol>

TRAINING FACILITY	QUALITY & RELEVANCE	ORGANISATIONAL & INSTITUTIONAL	TEACHING & LEARNING
	<ol style="list-style-type: none"> <li>2. Strengthen graduate network through formation of self-help groups and access to business management training &amp; affordable micro finance</li> <li>3. Improve the curriculum for all trades to be inclusive (PWDs).</li> <li>4. Develop 1 new course (hairdressing, leatherwork, soap making, catering and hospitality, refrigeration and air conditioning repairs)</li> </ol>	<ol style="list-style-type: none"> <li>2. Participate in capacity development of other VTCs and other outreach VETs</li> </ol>	<ol style="list-style-type: none"> <li>3. Integrate life skills training; peace and reconciliation, parenting and childcare, disability and gender awareness</li> <li>4. improve teaching and learning materials &amp; equipment</li> </ol>
<ol style="list-style-type: none"> <li>3. Friends of Children Foundation (Wau)</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop 2 new curricula for agriculture/horticulture and bakery, (hairdressing and beauty, English and literacy)</li> <li>2. Improve the curriculum for tailoring course</li> <li>3. Train the teachers</li> <li>4. Setup track and trace system for the graduates</li> <li>5. Establish labour market (employer) linkages</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop institutional policies namely; Finance, PWDs, Gender mainstreaming and employer engagement.</li> <li>2. Increase accessibility and facilities for PWDs</li> <li>3. Construct 1 classroom for training</li> <li>4. Participate in VTCs networks</li> </ol>	<ol style="list-style-type: none"> <li>1. Recruit and pay 2-3 teachers</li> <li>2. Develop teacher refresher courses</li> <li>3. Integrate life skills training program such as peace and reconciliation, communication &amp; business management skills, English and literacy skills, parenting and childcare; reproductive health, disability and gender awareness</li> <li>4. Establish apprenticeship program and linkages to the labour market.</li> <li>5. Procure teaching and learning materials</li> </ol>
<ol style="list-style-type: none"> <li>4. Dorcas Community Development Training Center (Wau)</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop a track and trace to gather information from Labour market through graduate and employer network system.</li> <li>2. Strengthen graduate network through formation of self-help groups and access to business management training &amp; affordable micro finance</li> <li>3. Improve the curriculum for all trades to be inclusive (PWDs).</li> </ol>	<ol style="list-style-type: none"> <li>1. Increase accessibility and facilities for PWDs</li> <li>2. Set up 1 childcare facility</li> <li>3. Establish network of VETs and participate in harmonisation of VETs curriculum of all the trades</li> <li>4. Participate in capacity development &amp; operationalisation of other VTCs and Nazareth outreach VETs</li> </ol>	<ol style="list-style-type: none"> <li>1. improve teacher refresher courses</li> <li>2. Integrate life skills training program such as peace and reconciliation, communication &amp; business management skills, English and literacy skills, parenting and childcare; reproductive health, disability and gender awareness</li> <li>3. Establish apprenticeship program and linkages to the labour market</li> </ol>



TRAINING FACILITY	QUALITY & RELEVANCE	ORGANISATIONAL & INSTITUTIONAL	TEACHING & LEARNING
	<ol style="list-style-type: none"> <li>improve the curricula of 2 courses of ICT course, and agriculture/horticulture</li> <li>Scale up ICT course, and agriculture/horticulture.</li> </ol>		<ol style="list-style-type: none"> <li>Improve teaching and learning materials</li> </ol>
5. Youth Center (Kuajok) VTC is not Operational	<ol style="list-style-type: none"> <li>Develop 2 new curricula for tailoring and bakery. (masonry)</li> <li>Improve the current curricula for computer course.</li> <li>Train the teachers</li> <li>Setup track and trace system for the graduates</li> <li>Establish labour market (employer) linkages</li> </ol>	<ol style="list-style-type: none"> <li>Develop institutional policies namely; Finance, PWDs, Gender mainstreaming and employer engagement.</li> <li>Increase accessibility and facilities for PWDs</li> <li>Construct 1 classroom for training</li> <li>Participate in VTCs networks</li> <li>Set up a bicycle-lending and tricycle grant scheme for youth &amp; PWDs living in remote places</li> </ol>	<ol style="list-style-type: none"> <li>Recruit and pay 2-3 teachers</li> <li>Develop teacher refresher courses</li> <li>Integrate life skills training program such as peace and reconciliation, communication &amp; business management skills, English and literacy skills, parenting and childcare; reproductive health, disability and gender awareness</li> <li>Establish apprenticeship program and linkages to the labour market. Procure teaching and learning materials</li> </ol>
6. Mayen Gumel (Kuajok) VTC is not Operational	<ol style="list-style-type: none"> <li>Develop 3 new curricula for masonry, tailoring and carpentry &amp; joinery. (business skills computer)</li> <li>Develop curricula for English proficiency training (returnees are Arabic speaking)</li> <li>Improve the current curricula for computer course.</li> <li>Train the teachers</li> <li>Setup track and trace system for the graduates</li> <li>Establish labour market (employer) linkages</li> </ol>	<ol style="list-style-type: none"> <li>Develop institutional policies namely; Finance, PWDs, Gender mainstreaming and employer engagement.</li> <li>Increase accessibility and facilities for PWDs</li> <li>Renovate the training centre</li> <li>Introduce childcare centre</li> <li>Participate in VTCs networks</li> <li>Set up a bicycle-lending and tricycle grant scheme for youth and PWDs living in remote places</li> </ol>	<ol style="list-style-type: none"> <li>Recruit and pay 2-3 teachers</li> <li>Develop teacher refresher courses</li> <li>Integrate life skills training program such as peace and reconciliation, communication &amp; business management skills, English and literacy skills, parenting and childcare; reproductive health, disability and gender awareness</li> <li>Establish apprenticeship program and linkages to the labour market. Procure teaching and learning materials</li> </ol>
7. Mayen Pajok (Akon North)	<ol style="list-style-type: none"> <li>Improve &amp; implement the 3 existing curricula; tailoring, business management, English, bakery</li> </ol>	<ol style="list-style-type: none"> <li>Construct 1 training hall</li> <li>Increase accessibility and facilities for PWDs</li> <li>Establish an outreach VET in Majak Bol</li> </ol>	<ol style="list-style-type: none"> <li>Recruit and pay 2-3 teachers</li> <li>Develop teacher refresher courses</li> <li>Integrate life skills training program such as peace and reconciliation,</li> </ol>

TRAINING FACILITY	QUALITY & RELEVANCE	ORGANISATIONAL & INSTITUTIONAL	TEACHING & LEARNING
	<ol style="list-style-type: none"> <li>2. Introduction of each new courses per year using existing curricula from Don Bosco; masonry, carpentry &amp; joinery, cooking.</li> <li>3. Train the teachers</li> <li>4. Setup track and trace system for the graduates</li> <li>5. Establish labour market (employer) linkages</li> </ol>	<ol style="list-style-type: none"> <li>4. Train and operationalise the centre management committee</li> </ol>	<p>communication &amp; business management skills, English and literacy skills, parenting and childcare; reproductive health, disability and gender awareness</p> <ol style="list-style-type: none"> <li>4. Establish apprenticeship program and linkages to the labour market.</li> <li>5. Procure teaching and learning materials</li> </ol>

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