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Free Movement of Persons and Transhumance in the IGAD Region

Labour Market Assessment

SUDAN

Country report

with focus on migrant workers from the IGAD region

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Labour market assessment with focus on migrant workers from the IGAD region:

Sudan country report

Free Movement of Persons and Transhumance in the IGAD Region: Improving Opportunities for Regular Labour Mobility

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Abbreviations and acronyms

CATI	computer-assisted telephone interview
CBS	Central Bureau of Statistics
GDP	gross domestic product
GEM	Global Entrepreneurship Monitor
GIZ	German Corporation for International Cooperation (Deutsche Gesellschaft für Internationale Zusammenarbeit)
ICLS	International Conference of Labour Statisticians
IGAD	Intergovernmental Authority on Development
IMF	International Monetary Fund
IMPS	Industrial Modernization Programme of the Republic of Sudan
IOM	International Organization for Migration
IPRSP	Interim Poverty Reduction Strategy Paper
MOLSD	Ministry of Labour and Social Development
PPP	purchasing power parity
SSWA	Secretariat of Sudanese Working Abroad
TVET	Technical and Vocational Education and Training
UNCTAD	United Nations Conference on Trade and Development
UNDESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNHCR	United Nations Human Commission for Refugees
UNIDO	United Nations Industrial Development Organization

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Foreword

The ILO in close collaboration with the Intergovernmental Authority on Development (IGAD) Secretariat has produced this report titled ***Labour Market Assessment with a Focus on Migrant Workers from the IGAD Region: Sudan Country Report*** as part of the project on Free Movement of Persons and Transhumance in the IGAD Region: Improving Opportunities for Regular Labour Mobility financed by the European Union. The report forms part of the knowledge-generation component of the project, and provides an evidence base for improving labour migration and mobility governance in the IGAD region.

This Sudan country report sheds light on the overall economic, labour, employment and migration dynamics in the country. The report differs from typical labour market assessments, as it focuses on the participation of migrant workers from IGAD Member States in the labour market in Sudan. It draws on available secondary data and primary information collected as part of the study, including through quantitative interviews, focus group discussions and key informant interviews with migrant workers, government officials, employers' organizations, workers' organizations, international organizations, non-government organizations and other relevant stakeholders.

The report examines labour force characteristics, current and future demand for skills, and job creation patterns, and identifies sectors that have high potential for job creation for nationals and migrants in an integrated regional labour market. It also looks at labour market efficiency and functionality by reviewing institutional arrangements and processes, including policies, legislation, labour market information systems and employment services, among other things. The report then identifies key challenges and opportunities related to improving labour market and labour migration governance and to supporting employment and job promotion for nationals and migrants in the IGAD region. At the end, the report proposes a number of key strategic recommendations to improve access to the labour market in Sudan by migrant workers from IGAD Members and to improve labour migration governance in the region. We advise you consult, in addition to this Sudan country report, the regional report covering an analysis of the IGAD labour market and its inclusiveness of migrant workers from Member States.

We believe that this series of labour market assessments focused on migrant workers will be instrumental towards the implementation of the road map of the IGAD Protocol on Free Movement of Persons. Understanding the challenges migrant workers face and implementing the recommendations proposed in these reports will also pave the way for increased opportunities for regular labour mobility and regional integration.

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Executive summary

The ILO is implementing the European Union Emergency Trust Fund financed project entitled Free Movement of Persons and Transhumance in the Intergovernmental Authority on Development (IGAD) Region: Improving Opportunities for Regular Labour Mobility. The overall objective of the project is to improve opportunities for regulated labour mobility and decent work within the IGAD Member States through the development of models of intervention. In the long-term, the project is expected to extend decent work opportunities to current and potential migrants within the region, as well as contribute to regional integration, strengthen links between economic growth, climate change and job creation; and enhance the social and economic integration of migrants.[1]

This report is an analysis of the Sudan's labour market with a focus on a sample of migrant workers from IGAD Member states. The report is one of a series undertaken in IGAD Member States (Djibouti, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda) to understand the overall economic, labour, employment and migration dynamics in these countries. It focuses on migration-prone areas, particularly places of origin, transit and destination. This analysis falls under a knowledge-building component of the ILO project, which seeks to deepen understanding of migration and labour market dynamics in the region.

The analysis presented in this report looks at labour force characteristics, job creation patterns, and challenges and opportunities for improved labour market governance to support employment and job promotion. It considers labour market information, employment services and migrant workers, as well as labour market efficiency in the wider socio-economic context. Primary data was collected to help inform the analysis, consisting of 401 quantitative interviews with migrant workers from IGAD Member states; 40 key informant interviews with government officials, employers' organizations, workers' organizations, international organizations, non-government organizations and other relevant stakeholders; and eight focus group discussions with Sudanese communities and migrant workers. Data collection took place between April and August 2019 in Blue Nile State, Gedaref State, Kassala State and Khartoum 2. The report concludes with recommendations at the strategy, policy and intervention levels, respective to each of the social partners.

Overview of migration trends and the labour market

Sudan is a country of origin, destination and transit for migrants. Sudan's porous borders and location on the Northern migration route (for African migrants, including those from IGAD Member States, headed to Libya and Europe), and on the route for migrants from Central and West Africa to the Gulf States (both for economic reasons and pilgrimage to Mecca) make it a prime transit country for migrants. Migration to and through Sudan is largely irregular with substantial risks of trafficking and smuggling.

IGAD Member States accounted for around 80 per cent of the total migrant population located in Sudan in 2017, many of whom are refugees. However, data on international migrants in Sudan varies from source to source, as does the number of refugees as part of the stock of international migrants. Numbers also change drastically one year to the next, even from the same source. For example, the Population Division of the United Nations Department of Economic and Social Affairs (UNDESA 2017b) estimated that there were 736,000 international migrants in Sudan in 2017, hailing mainly from South Sudan (43 per cent), Eritrea (27 per cent) and Ethiopia (10 per cent). In 2019, just two years later, UNDESA (2019) updated its estimate of international migrant stock to 1.2 million, with the three largest immigrant groups hailing from South Sudan (64.5 per cent), Eritrea (7.7 per cent) and

1 For more information see the project landing page at: https://www.ilo.org/africa/technical-cooperation/WCMS_631153/lang--en/index.htm.

2 In Khartoum, only key informant interviews took place.

Chad (7.7 per cent). Similarly, according to UNDESA (2017) there were 470,000 refugees in Sudan in 2017, but that figure jumps to 1.1 million in 2018 according to the United Nations High Commissioner for Refugees (UNHCR 2019). All these numbers should therefore be used to get a sense of orders of magnitude rather than as precise estimates.

Mixed migration flows complicate estimates of the number of migrant workers in Sudan and therefore the contribution of migrant workers to the Sudanese economy. It is evident from secondary data as well as primary quantitative data and key informant interviews conducted as part of this study, that there are a wide range of motivations for leaving a country of origin and choosing to go to Sudan, where these individuals end up as migrant workers. Oftentimes, these motivations change along the journey. According to the Ministry of Labour and Social Development (MOLSD), there were 30,119 migrant workers with work permits in 2019 (MOLSD 2019). Around 80,000 Ethiopians cross over into Sudan every year to find seasonal employment into the states of Kassala and Gedaref (GIZ 2018). The most recent Labour Force Survey (2011) estimates that there were 66,750 foreign workers in 2011. As these numbers suggest, the extent of migration and of working migration is too complex in Sudan to be captured by a single source.

Labour force characteristics presented in this report suggest that Sudan's labour force is relatively underutilized. Labour force participation of the working age population (ages 15-plus) is low by regional and global standards, with only 50 per cent of the working age population participating in the labour market. This is driven by low female participation: less than one in three women are in the labour force. In addition, a lack of decent work opportunities translates in a large share of own-account work. A quarter of the employed are in working poverty according to ILO modelled estimates. The relatively low levels of education that characterize those in and outside of the labour force also weigh on the skills composition of the labour force.

Migrant worker characteristics from primary data

The lack of data on migrant workers in Sudan was addressed via primary data as part of this assignment, exposing differences by length of stay and migration status. Primary data identified migrant workers' migration status and length of stay, namely, those who were in the country for more than six months in terms of whether the migrant had official documentation (regular migration status) or not (irregular migration status). Migration status was not captured for those in the country for less than six months. While a migrant worker's work permit status can be attached to their migration status, it cannot be assumed in all cases, and so data is only presented by migration status (rights to be in the country) and not migrant worker status (rights to be in the country as well as rights to work).

The main type of migrant worker interviewed in Sudan was found to be seasonal agricultural workers who come to support the planting and harvesting season in the eastern states. Theoretically these migrant workers return to their countries of origin following the end of the work. However, the reality is that many stay on and work in mining, other forms of casual and informal labour, or continue onward travel using Sudan as a transit country for migration. A number of key informants stressed the importance of these migrant workers to the country's agricultural output, but equally, seasonal agricultural work is of a low-skilled nature. The lack of higher-skilled migrant workers limits the potential for skills transfer and similar benefits to the host communities. However, key informants also highlighted that migrant workers could be considered underutilized in that they could offer more to Sudan's labour market if governance systems permitted it.

Long-term migrant workers with irregular migration statuses interviewed for this study were more likely to be working in low-skilled occupations. According to primary data collected as part of this study, there were significant differences in the occupational skills compositions of migrant workers by migration status and length of stay. For short-term migrant workers in Sudan, the vast majority (92 per cent) were in medium-skilled occupations and only 7 per cent were in low-skilled occupations. None of them were working in high-skilled occupations. Whereas for long-term migrant workers in Sudan, there was a large difference in occupational skill levels between those with regular migration status and those without, as those with irregular status were far more likely to be working in low-skilled occupations (27 per cent) compared to only 7 per cent of those with regular migration status.

While the majority of short-term migrant workers interviewed were hired as employees on temporary contracts, employers do not appear hesitant to hire those with irregular migration statuses. Both long-term and short-term migrant workers from the sample were similarly likely to be employees (both at around 80 per cent). However, nine out of every ten employee contracts are temporary in nature, regardless of migration status and length of stay. Similarly, a 2017 study by the International Organization for Migration (IOM) found that 84 per cent of migrant workers interviewed in Khartoum had not signed any contract of employment and were therefore likely to be informally employed.

Job creation and the business environment

There is a shortage of decent and productive employment opportunities in Sudan. Economic activity is dominated by low-productivity agriculture and services. Manufacturing plays a minor role. Sudan may be described as a largely rural and traditional economy that has made little progress on the road to industrialization and economic efficiency. Sudan can boast some of Africa's greatest untapped agricultural lands, enormous touristic potential and vast mining opportunities. These vast resources remain greatly underutilized, due largely to the political/security context and international sanctions. Limited moves to expand the private sector have been taken in the past two decades, including the privatization of state-run enterprises, but the overall business environment is plagued by numerous difficulties, including beyond those directly related to international sanctions. Investment bodies encourage foreign investment, but there are limitations on the hiring of migrant workers unless a project is deemed to be highly strategic or in a free economic zone.

Major improvements in the business environment and a proactive industrialization policy would need to be complemented with a guiding strategy on decent and productive employment. Jobs are a key priority for the country and experience shows they may not be expected to be the by-product of private sector reforms or even of (any form of) industrialization programme. For the economy to make good use of Sudan's workforce, including its migrant workforce, employment needs to be a target across public policies, and key policies must consider adequate approaches to maximizing their employment impact.

Recommendations for decent and productive employment and jobs promotion in Sudan

While the national employment policy is being revised, it appears that it is being done without a sufficient evidence base and without sufficient institutional involvement. This assumption is made on the basis of the widespread lack of labour market information in Sudan and the findings of a parallel study by the ILO (2020a) that highlights the lack of institutional consultation, including with social partners, as part of the development of this policy. Mainstreaming the promotion of productive and decent work for all (including migrant workers) within Sudan's development agenda is the first of the strategic recommendations. Ratification and compliance with the Freedom of Association and Protection of the Right Organise Convention, 1948 (No. 87) – an ILO fundamental Convention – would also be instrumental in this regard.

Strategic recommendation 1: Mainstream the promotion of productive and decent work for all (including migrant workers) throughout Sudan's development agenda.

- **POLICY:** Support the National Steering Committee for the revision of the national employment policy, ensuring that the policy has been developed in collaboration with social partners and all relevant government departments, including those responsible for education, skills development, migration and economic policies, and in alignment with a labour migration policy.
- **POLICY:** Finalize Sudan's migration policy.
- **INTERVENTION:** Build the capacity of the members of the National Steering Committee.

- **INTERVENTION:** Improve and strengthen Sudan's labour administration system (labour inspection, dispute resolution, occupational health and safety), including ratification and compliance with the ILO Labour Administration Convention, 1978 (No. 150).

Strategic recommendation 2: Enhance the capacity and improved coordination of labour market information and analysis.

There is also a widespread lack of systematic labour market information in Sudan (the last labour force survey was in 2011 and the last establishment survey was in 2007), and a lack of any coordination and analysis. As mentioned above, the forthcoming national employment policy and any employment and job promotion programmes have not been based on a sufficiently comprehensive base of up-to-date and regular labour market information. Moreover, while some data are collected by different institutions, there is a lack of coordination and sharing of data and information.

The Central Bureau of Statistics (CBS) of Sudan, with the support of the United Nations Development Programme (with additional inputs by one or two development partners), coordinated the design process of a National Strategy for the Development of Statistics (2012–2016), inclusive of sectoral and state-level strategies. However, although it was launched in 2011 and approved by the Council of Ministers in 2013, the National Strategy has not been implemented.

- **POLICY:** Update the National Strategy for the Development of Statistics 2012–2016 to support a results-based development agenda and good governance for all stakeholders, users and producers.
- **POLICY:** Design a labour statistics framework that produces subnational estimates for key labour market indicators and captures information on migrant worker flows and characteristics.
- **POLICY:** Establish a technical committee to update the National Strategy for the Development of Statistics 2012–2016 in collaboration with the CBS.
- **INTERVENTION:** Secure funds and support the implementation of the 2012–2016 National Strategy for the Development of Labour Statistics designed by the Ministry of Labour and Social Development.
- **INTERVENTION:** Implement and fund a labour force survey on a more regular basis, including expanded module on labour migration.
- **INTERVENTION:** Implement and/or facilitate the implementation of regular establishment surveys.
- **INTERVENTION:** Update and activate Sudan's Data Dissemination System (SDDS) and update existing portals such as http://sudan.opendataforafrica.org.
- **INTERVENTION:** Update and activate the Ministry of Labour and Social Development's website.
- **INTERVENTION:** Promote and find partners to conduct a rapid computer-assisted telephone interviewing (CATI) labour force survey to identify key labour market impacts of Covid-19.

Strategic recommendation 3: Enhance the capacity and coordination of employment services within a wider national employment and jobs strategy.

Employment services play an integral role in the functionality of the labour market and are also an important source of information, particularly around labour demand, yet are underutilized. In Sudan, while public employment services provide a number of key services, both to nationals and migrant workers, there are measures that can help make better use of employment services, in terms of their effectiveness and the information they capture, for the benefit of workers, jobseekers, employers and the Government.

- **POLICY:** Ratify and enforce compliance with the Employment Services Convention, 1948 (No. 088) and the Private Employment Agencies Convention, 1997 (No. 181).
- **POLICY:** Establish memoranda of understanding between workers' groups and public and private employment agencies on the sharing of labour market information and the sharing of information on workers' rights, including migrant workers' rights.
- **POLICY:** Improve coordination between the state and federal levels on employment services, with clear institutional roles.
- **INTERVENTION:** Provide sufficient resources to allow for capacity building of public employment service staff for improved access to employment services.
- **INTERVENTION:** Actively promote the use of public employment services, through the encouragement of employers to advertise and seek candidates through these services.
- **INTERVENTION:** Expand the official employment services institutions and define their competencies precisely (registration, nomination, job matching, selection and employment).

Strategic recommendation 4: Adjust and redesign labour market governance mechanisms to better incorporate migrant workers.

An important message that emerges from this report is that migrant workers contribute to the labour force, and their needs and challenges have to be addressed as part of labour, employment and skills development policies that foster the utilization of their potential for inclusive and sustainable economic growth.

Many migrant workers are currently outside the realm of labour market legislation. Firstly, seasonal agricultural workers are the main type of migrant worker in Sudan, yet the Labour Code, 1997, explicitly does not cover agricultural workers (among other select occupations and types of work). Sometimes there is state-level legislation that covers seasonal agricultural migrant workers, but it is unclear whether this is always the case. Secondly, there are discrepancies between federal- and state-level legislation towards migrant workers, particularly from a labour migration and migration policy perspective. This creates grey areas concerning regular labour migration (that is, with regard to both with permission to enter and permission to work) and migrant workers' ability to know their rights. Finally, the last substantial finding is the lack of data and information on migrant workers; however, this is covered up above in strategic recommendation 2 on labour market information.

- **POLICY:** Address existing gaps in labour market governance (that is, the Labour Code, 1997) where migrant workers are most prevalent, including seasonal agricultural workers, casual labourers, and domestic workers.
- **POLICY:** Ratify and comply with the:
  - ILO Migration for Employment Convention (Revised), 1949 (No. 97);
  - Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143);
  - Labour Inspection (Agriculture) Convention, 1969 (No. 129); and
  - Domestic Workers Convention, 2011 (No. 189).
- **POLICY:** Improve coordination between federal- and state level legislation, particularly around migrant workers from a labour market perspective.
- **INTERVENTION:** Ensure compliance with labour market governance, including guaranteeing that relevant actors have sufficient resources and capacity to ensure compliance with legislation and regulations, including to encourage and assist refugees to obtain work permits.

Chapter 1

Introduction

The Intergovernmental Authority on Development (IGAD) region is characterized by a range of migratory movements driven by political, economic and environmental factors, and encompassing different categories of migrants, including economic migrants, refugees and forcibly displaced persons. To date, IGAD and its Member States have already taken numerous steps to govern and address the issue of migration in the region, including adoption of the IGAD Regional Migration Policy Framework and the Migration Action Plan and promising steps taken towards the adoption of the IGAD Protocol on Free Movement of Persons. Both the Regional Migration Policy Framework and the Migration Action Plan have identified the facilitation of labour mobility, transhumance and free movement of persons as a strategic priority. In addition, in 2013, the Summit of IGAD Heads of State and Government adopted a Minimum Integration Plan to serve as a roadmap for regional integration, in which the free movement of persons is a key pillar. To this end, IGAD Member States endorsed in February 2020 a Free Movement and Transhumance Protocol, and steps are underway to accelerate the adoption of a roadmap for implementation of the protocol.

In order to support IGAD and its Member States aspiration towards a free movement regime, the ILO is implementing the European Union Emergency Trust Fund-financed project Free Movement of Persons and Transhumance in the IGAD Region: Improving Opportunities for Regular Labour Mobility. The overall objective of the project is to improve opportunities for regulated labour mobility and decent work within IGAD Member States through the development of models of intervention, in the broader context of free movement of persons and labour mobility in the region. In the long term, the project is expected to extend decent work opportunities to current and potential migrants within the region, as well as contribute to regional integration; strengthen links between economic growth, climate change and job creation; and enhance the social and economic integration of migrants. The project has two major components: (i) knowledge-building and (ii) operational implementation. One of the main focal areas of the project is to deepen understanding of migration and labour market dynamics in the region, including the constraints and opportunities for employment creation and causes of skills shortages. As part of this knowledge generation component of the project, labour market analyses have been undertaken in IGAD Member States to understand the overall economic, labour, employment and migration dynamics in the countries, focusing on migration prone areas, particularly places of origin, transit and destination.

In this regard, the ILO has commissioned MarketShare Associates to conduct these labour market analyses in IGAD Member States: Djibouti, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda. These are captured in country reports and a regional synthesis report. Each report consists of an analysis of labour force characteristics, job creation patterns, and challenges and opportunities for improved labour market governance to support employment and job promotion. It considers labour market information, employment services and migrant workers, as well as labour market efficiency in the wider socio-economic context. Notably, each of these areas is focused on their relevance to employment and jobs promotion. Finally, the reports provide recommendations on each of these components, at the strategy, policy and intervention levels, respective to each of the social partners. Both primary and secondary data are used in this analysis.

Chapter 2

About the report

This chapter is structured as follows: Section 2.1. outlines the study objective and structure of the report; Section 2.2. provides an overview of definitions and concepts used in the study; Section 2.3. provides an overview of the primary data approach; Section 2.4. provides an overview of the secondary data approach; Section 2.5. addresses the stakeholder consultation concerning the finalization of the report; and Section 2.6. presents limitations to the study.

2.1. Objective and structure of the report

This labour market assessment (henceforth also referred to as "the report") aims to help deepen understanding of the labour migration and labour market structures and dynamics in the IGAD region. Against this backdrop, the report provides an analysis of Sudan's labour market, paying particular attention to labour migration and opportunities for productive employment for migrants and nationals.

Accordingly, the report provides an analysis of labour force characteristics, an overview of job creation and private sector development, and areas for improved governance for employment and jobs creation. It draws from available secondary data and new primary data and information collected as part of the study. This primary data and information consist of quantitative information collected through a questionnaire and qualitative data from interviews and focus group discussions with key stakeholders and seeks to fill information gaps and validate secondary data findings. The structure of the main body of the report and the main source of information are as follows in table 1:

Table 1. Structure of main body of report and types of data used

Section of report	Type of data
3. Socio-economic context	
3.1. Socio-economic context	Secondary data
4. Labour force characteristics	
4.1. Labour force	Secondary data
4.2. Migrant workers	Secondary data and primary data
4.3. Skills composition	Secondary data and primary data
5. Job creation and the private sector	
5.1. Economic growth and trends	Secondary data
5.2. Private sector development	Secondary data
6. Labour force characteristics	
6.1. Employment policy and legislation	Secondary data and primary data
6.2. Labour market information	Secondary data and primary data
6.3. Employment services	Secondary data and primary data
6.4. Migrant workers	Secondary data and primary data

The report concludes with recommendations and next steps at the strategy, policy and intervention level, addressed at each of the social partners, that is, the Government, employers' groups and workers' groups.

2.2. Concepts and definitions

Appendix IV provides a glossary of definitions and concepts used in the study. As detailed in this section, the labour market definitions are consistent with the 19th International Conference of Labour Statisticians (ICLS) resolution on statistics of work, employment and labour underutilization (ILO 2013, and see box 1 below). For clarity, the definition of migrant workers as used in this study is presented below.

Box 1. The importance of compliance with ICLS definitions and guidelines

The ICLS is the global standard-setting body in the area of labour statistics that convenes every five years. The ICLS sets guidelines for concepts and definitions that allow for consistent measurement and use of terms for all social partners, including labour ministries and national statistics offices, employers' groups and workers' groups. In the context of this study, secondary sources of labour market statistics and primary data and information were collected and compiled. It is important to highlight that these statistics and information are consistent with ICLS standards to allow for effective policymaking in Djibouti and comparability of findings among IGAD Member States.

Source: ILO 2018b.

"Migrant worker" or "international migrant worker" refers to all persons of working age (in this case, aged 15+ is used) present in the country of measurement, who were during the specified reference period in one of the following two categories:

i. usual residents – International migrants who were in the labour force of the country of their usual residence, either in employment or in unemployment; or

ii. Not usual residents (or "non-resident foreign workers") – Persons who, during a specified reference period, were not usual residents of the country, but were present in the country and had labour attachment to the country, that is, were either in employment supplying labour to resident producer units of that country or were seeking employment in that country.

Given the primary data collection element of this study, this definition is in line with the 20th ICLS Guidelines Concerning Statistics for International Labour Migration (ILO 2018b).

2.3. Primary data collection

Under the terms of reference for this assignment, primary data collection was prescribed at 400 quantitative interviews, 40 key informant interviews and eight focus group discussions, per country. Data collection focused on migrant prone locations. These quotas were fixed, and a sampling process and fieldwork plan were devised to maximize the value of the data gathered for both for the objectives of this study and for the wider research community. The following sub-sections provide information of the data collection for each component. Primary data collection took place between April and August 2019. This coincided with a coup d'état which ultimately impacted the data collection and required some adjustments in the approach, as detailed in the following subsections.

2.3.1. Quantitative interviews

Quantitative interviews were conducted in Blue Nile (128 interviews), Gedaref (140 interviews) and Kassala (133 interviews). Originally data collection was meant to take place in Khartoum, however the situation was considered unmanageable following the coup d'état and the subsequent social unrest in the capital. Enumerators were trained as part of the fieldwork process in each site and were briefed on the objectives of the assignment, the data collection tools and the selection process. Pilots were conducted in each state and verified by team leaders per location.

Interviews were conducted face-to-face with a standardized questionnaire (provided in Appendix II). The questionnaire was designed to capture the necessary information to be able to calculate variables that complied with ICLS-adopted labour statistics concepts and definitions (see Section 2.2.). It should be noted that the structure of the questions is similar to a Labour Force Survey questionnaire in order to allow comparability, however the primary data collection was fundamentally different in that it was conducted as an individual assessment and not a household survey and was focused only on a subset of variables, with additional questions to capture information on migrant workers. The questionnaire contained four modules to capture information in the following areas:

- **Module 1:** Socio-economic characteristics of migrant workers
- **Module 2:** Labour force status of migrant workers
- **Module 3:** Characteristics of migrant workers
- **Module 4:** Nature of labour migration

The locations of Blue Nile, Gedaref, Kassala and Khartoum were proposed for quantitative data collection during the inception phase of the study and agreed upon with the ILO. As mentioned above, Khartoum was later dropped due to the unrest in the city during the period of data collection. The remaining states were selected on the basis that they were major recipients of migrant workers, but particularly seasonal migrant workers in Kassala and Gedaref, part of an area known as the Sudan–Ethiopia migration corridor. It is important to note that this study on Sudan falls within a wider study for the IGAD region, and hence the importance of examining different types of labour migration. Given the limited sample scope for the data collection, this seasonal migration was prioritized in the data and information collection for Sudan.

The questionnaire allowed for the identification of migrant workers from IGAD Member States, their migration status and length of stay. The migration status is only indicated for long-term migrant workers who have been in the country for more than six months and is assessed in relation to whether the migrant has official documentation (regular migration status) or not (irregular migration status). It was not captured for short-term migrant workers who have been in the country for less than six months. While typically a migrant worker's migration status is attached to their work permit status, it cannot be assumed in all cases, and so the data presented are by migration status, not migrant worker status.

2.3.2. Description of the sample

The sample sought to capture information on migrant workers from a range of different countries of origin, ages and both sexes (see Section 2.6. for sampling process and limitations). However, because of the nature of labour migration in the Sudan–Ethiopia corridor, namely seasonal work that is predominantly undertaken by male migrant workers, the sample ended up being largely composed of men (86 per cent) of Ethiopian (57 per cent) and Eritrean (34 per cent) origin.

Table 2 below provides an overview of the sample, by state and by sex, and by selected indicators. The data shows that migrant workers from the sample were mainly adults (about three-quarters were above 25 years old). A quarter of the sample had been in Sudan for less than 6 months, and half of the sample had regular migration status. This could underline the complex nature of migration in Sudan, as both a country of transit (shown by the share of the sample who has been resident in Sudan for less than six months) as well as a country of destination (shown by the share of the sample with regular migration status). Over 86 per cent of migrant workers sampled had low levels of education (primary or less), yet more than half (239) were engaged in medium-skilled occupations.

The fact that 85 people in the sample (21 per cent) were classified as being outside of the labour force may seem surprising considering that the methodology specifically targeted migrant workers. This can be explained by the fact that a strict definition of unemployment has been used to classify respondents. According to this definition, three criteria need to be fulfilled to define a situation of unemployment: not having a job, actively searching for a job, and being immediately available to start a job should an opportunity arise. In labour markets that are largely informal, these criteria cannot always be fully observed, and the application of this strict definition results in classifying more people as out of the labour force than if a relaxed definition were to be applied.

Numbers confirm the large incidence of informal work among interviewees. The fact that 284 interviewees were in informal work and that 177 reported being employed in a formal unit underlines how blurred the line is between formality and informality in Sudan, both at the economic and labour levels.

Table 2. Overview of the sample of migrant workers in Sudan by sex, state and selected indicators

State or indicator	Male	Female	Total
State	**344**	**57**	**401**
Blue Nile	103	25	128
Gedaref	114	26	114
Kassala	127	6	127
Age	**344**	**57**	**401**
15–24	79	16	95
25+	265	41	306
Migration status	**344**	**57**	**401**
Less than 6 months	78	24	102
Irregular status (more than 6 months)	84	18	102
Regular status (more than 6 months)	182	15	197

Educational attainment	**344**	**57**	**401**
Less than primary	107	24	131
Primary	190	27	217
Secondary	29	5	34
Tertiary	14	–	14
Not stated	4	1	5
Labour force status	**344**	**57**	**401**
Employed	255	36	291
Unemployed	22	3	25
Out of labour force	67	18	85
Status in employment	**255**	**36**	**291**
Wage employed	175	20	195
Employer	51	7	58
Own account worker	12	6	18
No response / unclassifiable	17	3	20
Occupational skills level	**255**	**36**	**291**
Low-skilled	25	9	34
Medium-skilled	213	26	239
High-skilled	8	–	8
Not elsewhere classified	9	1	10
Informality	**n.a.**	**n.a.**	**n.a.**
Informally employed	249	35	284
Working for an informal unit	153	24	177

– = nil; n.a. = not applicable.
Source: Primary quantitative data collection

2.3.2. Key informant interviews

A total of 40 key informant interviews were conducted in Gedaref (13 interviews), Kassala (11 interviews) and Khartoum (16 interviews). The timing for data collection coincided with the coup d'état, which presented some difficulties in interviewing key stakeholders, particularly government officials. The topic was also sometimes perceived to be a sensitive topic, and key informants occasionally were reluctant to elaborate on or provide detailed answers to questions.

Interviews were conducted face-to-face in a semi-structured format (see Appendix III). However, interviewers were encouraged to probe outside of the semi-structured guides depending on the type of stakeholder and depending on how the interview was going. A core semi-structured interview guide was focused on identifying key drivers of labour migration in the broader economic context, including economic disparities and decent and productive work deficits, formal and informal rules around labour migration governance, and the role of employment services to facilitate labour migration. Each interview lasted on average one hour.

Interviews were conducted with a wide range of key labour market stakeholders at local, regional and national levels. Consultations with government officials in each locality were also used to identify respondents that could provide information. Respondents included government officials; economists and specialists focusing on rural development and migration; employers across a variety of sectors; community members who are economically active or part of the potential labour force; as well as civil society organizations and non-governmental organizations (NGOs) working in this area.

Table 3 below presents an overview of the types of stakeholders interviewed and the full list of interviewees is presented in Appendix I.

Table 3. Overview of stakeholder interviews

Type of stakeholder	No. of interviews	Examples of stakeholders interviewed
Social partners		
Federal Government	7	Ministry of Finance and Economic Planning; Ministry of Labour and Social Development (MOLSD); Ministry of Agriculture and Forestry
State government	11	Manpower and Employment in the Jurisdiction of Gedaref; Governor of Kassala
Employers and employers' organizations	5	Sudanese Business and Employer Federation; Vegetables and Fruits Small Producers (industry union); Farmers' Union
Workers and workers' organizations	2	Sudanese Workers' Trade Union Federation; migrant workers

Type of stakeholder	No. of interviews	Examples of stakeholders interviewed
Other		
International organizations	4	German Corporation for International Cooperation (GIZ); International Organization for Migration (IOM); ILO
NGOs	4	Humanitarian Aid Commission; Peace Organization
Other	7	Village Committee member; local unemployed; Expert on MOLSD and Ministry of Education

2.3.4. Focus group discussions

Focus group discussions were conducted in Blue Nile (two group discussions), Gedaref (two group discussions) and Kassala (two group discussions) and Khartoum (two group discussions).

Discussions were conducted in groups of eight to ten people, with a facilitator who used a semi-structured guide to steer conversations around specific areas. The discussions were conducted with host communities and selected migrant workers, in male and female split groups to prevent sociocultural norms from undermining open discussions. The discussions sought to gather perspectives around labour migration, including the perceived impact on the economy and local community. Each discussion lasted on average one hour.

2.4. Secondary data collection

2.4.1. Desk review

A comprehensive desk review of secondary information was conducted to understand the situation and trends related to labour markets and labour migration in Sudan. The labour market analysis took into consideration information published in key planning documents as well as recent labour market analyses and research conducted. It also reviewed labour migration relevant legislation and policies as well as institutional mechanisms related to employment services. A full list of resources reviewed as part of this study is provided in the bibliography.

2.4.2. Secondary statistics

A wide range of available secondary statistics were compiled from key statistics sources to support the identification of socio-economic issues, labour market dynamics and labour migration corridors that offer decent and productive employment growth potentials. The main secondary statistics sources used are listed in table 4 below (please note this does not include primary data or reports that were not focused on statistics):

Table 4. Structure of main body of report and sources of secondary statistical data used

Section of report and type of data	Main source(s) of secondary statistics
3. Socio-economic context	
Gross domestic product (GDP)	International Monetary Fund (IMF) – World Economic Outlook Database – April 2019.
Population	United Nations Department of Economic and Social Affairs (UNDESA), Population Division – World Population Prospects: The 2017 Revision.
Urbanization	UNDESA, Population Division – World Urbanization Prospects: The 2018 Revision.
Poverty and inequality	African Development Bank (AfDB), "Sudan Poverty Profile: Summary Results of the 2014-2015 National Baseline Household Budget Survey", 2018.
Human development	UNDP – Human Development Indices and Indicators: 2018 Statistical Update.
Migrant stock	UNDESA. Population Division – Trends in International Migrant Stock: The 2017 Revision
Refugee stock	United Nations High Commissioner for Refugees (UNHCR) – UNHCR Population Statistics Database
Remittances	World Bank – Migration and Remittances database
4. Labour market supply	
Labour force	Sudan Labour Force Survey 2011; ILO Modelled Estimates
Migrant workers	Sudan Labour Force Survey 2011; IOM, *Migrants in Sudan: Pilot Study on Migrants' Motivations, Intentions and Decision-Making in Khartoum*, 2017.
Skills composition	Sudan Labour Force Survey 2011; IOM, *Migrants in Sudan: Pilot Study on Migrants' Motivations, Intentions and Decision-Making in Khartoum*, 2017.
5. Job creation and private sector	
Economic growth and trends	IMF – World Economic Outlook Database, April 2019; United Nations Conference on Trade and Development (UNCTAD) – UNCTADstat database.

The main source of labour market information was the Sudan Labour Force Survey 2011, which is relatively out of date for representing the labour market dynamics of the country today. However, labour force surveys need to be used in preference to other types of household survey (for example, income and expenditure surveys, censuses and assessments), particularly as the sampling is specific for the labour market and the Labour Force Survey questionnaire complies with ICLS standards. For this reason, the Sudan Labour

Force Survey 2011 was the primary source for labour market data, but this report does not claim it to represent the current situation (see Section 6.2. for overview of this survey and other labour market information).

Please note, that at the time of writing this report, delays in primary data collection were experienced as a result of the coup and permission processes subsequently were not recognized or accepted by local authorities. For this reason, an initial draft of this report as well as subsequent versions (but to a lesser degree) drew in places from a 2017 report by the IOM entitled Migrants in Sudan: Pilot Study on Migrants' Motivations, Intentions and Decision-Making in Khartoum. The IOM (2017) study does not meet the requirements of this study, however, in that it is not strictly focused on labour migrants (but rather migrants in general) and does not necessarily comply with ILO definitions. Nonetheless, it provides a snapshot of information on drivers of migration for a sample of migrants interviewed in Khartoum. The migrants in the IOM (2017) study were asked about their initial motivations and intentions for leaving their countries of origin, answers were captured via a Likert scale, which scored options from "Strongly agree" to "Strongly disagree".

In addition, ILO modelled estimates were used sparingly for regional and country comparisons. The modelled estimates use a combination of data from available household surveys applied to other wider datasets, including UN World Population Projections. Nonetheless, data from ILO modelled estimates are not always comparable with the underlying Labour Force Survey data due to deviations in definitions among other considerations. Therefore, they are not presented in a comparable manner and footnotes are applied to draw attention to this.

▶ 2.5. Final technical revision and virtual consultation

In its finalization phase, the report underwent a technical revision exercise and was presented to a broad group of stakeholders during a virtual workshop. The technical revision addressed the fact that, due to exceptional circumstances, such as the advent of the COVID-19 pandemic, the publication date of the report was delayed, with the effect that some of the data and information informing the socio-economic and policy sections of the report had to be updated. However, this delay allowed the technical review team (composed of two national and one international experts) to include some last-minute information about country responses to the pandemic (see Section 3.5.).

The report was then further enriched with comments collected during a final consultation workshop that brought together a large group of stakeholders. In line with restrictions adopted in the wake of the COVID-19 pandemic, the workshop was held virtually. It was organized around four parallel sessions, giving participants the opportunity to intervene in structured discussions along the themes of the report.

2.6. Limitations to the study

The above sections have listed the limitations according to each methodological component to the study, however it is necessary to clarify what this Sudan labour market analysis is and what it is not. This Sudan report is one of a series undertaken in select IGAD Member States (Djibouti, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda) to understand the overall economic, labour, employment and labour migration dynamics in the countries, and focuses on migration prone areas, particularly places of origin, transit and destination. As mentioned earlier, it contributes to the ILO project's efforts to deepen understanding of migrant workers and labour market dynamics in the region, including the constraints and opportunities for employment creation and causes of skills shortages.

Firstly, owing to the focus on a selected sample of migrant workers, this study is not a standard labour market analysis. This labour market analysis places emphasis on the role of migrant workers in the wider labour market and socio-economic context and considers how migrant workers can contribute to improved decent and productive employment in Sudan.

Secondly, while a labour force survey exists for Sudan and provides descriptive information of the labour force, a shortage of data and information on migrant workers in Sudan is addressed through new primary data and information collected on migrant workers, providing new and unique insights into the characteristics, drivers and motivations of labour migration in Sudan.

Thirdly, it was initially envisioned that the quantitative interviews would be conducted with migrant workers and national workers in order to allow for comparison between the two groups. This would have been conducted using a random sampling process. However, the required sample of 400 interviews was considered too small to have statistical significance in analysing the differences between the two groups, especially when disaggregating the data further. It should also be underscored that a representative sample was not feasible with 400 interviewees. As a result, the sample targeted migrant workers only using purposeful sampling. Enumerators with local context were able to identify individuals who were engaged in some form of work or actively looking for and available to work, and then to conduct interviews. Oversampling allowed for the eventuality that some of those who were interviewed were ultimately not classified as migrant workers according to the ICLS guidelines. Those who were classified as out of the labour force are still included in the dataset for analysis of labour underutilization. The imbalance in the number of men and women interviewed in this country study is also recognized as a shortfall, and has implications for the gender-dimensions of analysis and recommendations.

Finally, labour migration governance is very relevant to this analysis, however a parallel study was also commissioned entitled An Assessment of Labour Migration and Mobility Governance in the IGAD Region: Country Report for Sudan (ILO 2020). With this in mind, this Sudan labour market study seeks to complement not replicate this other report. The two reports should be seen as accompanying each other. It should also be noted that in this Sudan labour market study, migrant workers are considered from the perspective of the labour market and not from a migration perspective. The aforementioned ILO (2020a) report also looks at labour migration governance in the context of wider migration policy and should be consulted to get more information related to this angle.

Chapter 3

Socio-economic context

Sudan's recent history has been plagued by instability that compromises its ability to exhibit steady and stable economic growth. Located in Northern Africa, Sudan borders with IGAD Member States to the east (Eritrea, Ethiopia, South Sudan), Egypt to the north, and the Central African Republic, Chad and Libya to the west. It sits partially on the Red Sea and has developed irrigation systems from rivers running up the centre and east of the country. Such characteristics should bode well for economic opportunities and an oil boom saw GDP grow on average 4.2 per cent per annum between 2000 and 2011 (IMF 2019). But a civil war that concluded with the secession of South Sudan in 2011 constituted a heavy economic loss, namely through the foregoing of the majority of its oil territories to South Sudan. GDP growth dropped 17.5 per cent in 2012 following the secession and continued at 1.8 per cent per annum between 2012 and 2018 (IMF 2019).

Further conflict broke out between the Sudanese Government and the Sudan People's Liberation Army. As a result, Sudan's economy has struggled to stabilize, and since secession, growth has been weaker and erratic. Sudan remains the third-largest economy among the IGAD Member States, behind Kenya and Ethiopia, with the GDP in 2018 at US$33.2 billion, slightly higher than Uganda (at US$27.9 billion) (IMF 2019). With a gross national income per capita estimated at US$2,380 in 2017, Sudan is classified as a low middle-income economy according to the World Bank Atlas method. 3

3.1. Sectoral development

3.1.1. Industry

Prior to secession, the industrial sector accounted for over a quarter of GDP, but now only accounts for around 2 to 3 per cent (World Bank 2019). Despite this, oil exports are still important for fiscal revenues and export-driven growth; in 2017 for instance, oil accounted for around 44 per cent of exports (UNCTAD 2019). Mining, particularly gold mining, is expanding as a result of the opening-up of the gold sector, including legislation on gold exports by local private companies to help curb smuggling (EIU 2019). Gold accounted for around 24 per cent of all exports in 2017 (UNCTAD 2019). In terms of manufacturing, the sector has been largely dominated by small-scale industries, focused on the manufacture of food products and beverages, and with the decline of oil production, large-scale industry has been more limited (Dafa'Alla 2018). Manufacturing exports account for a very limited share of total merchandise exports, at around 2.8 per cent in 2017, and are mostly high-skilled and high-technology outputs (1.8 per cent), with little in the way of low-skilled, low-technology manufacturing exports (UNCTAD 2019).

3.1.2. Agriculture

Sudan is largely reliant on agriculture, which is characterized by subsistence farming and is highly vulnerable to external shocks. Agriculture accounted for around 30 per cent of GDP in 2017 (World Bank 2019), despite accounting for around 46 per cent per cent of the working population, according to the Labour Force Survey 2011. Away from the river regions where irrigation is feasible, farming is predominantly rain-fed, meaning vulnerability to extreme weather conditions, including drought, is severe. As a result, there are major implications for food security, livelihoods and inflation as a result of poor agricultural harvests and subsequent shortages. At the same time, currency devaluations combined with fuel shortages have raised input costs for agriculture, further stifling output (World

3 Lower middle-income economies are defined as those with a gross national income per capita, calculated using the World Bank Atlas method, between US$1,006 and US$3,955.

Bank 2015). At the same time, livestock production is a major contributor to export growth and is produced largely through pastoralism, with unofficial cross-border trade commonplace. Livestock accounts for the majority of agricultural production in Sudan, and exports of live animals accounted for nearly 10 per cent of all merchandise exports in 2017 (UNCTAD 2019). However, much of this is pastoral livestock, with some estimates suggesting up to 90 per cent of livestock is accounted for by pastoralists (Young et al. 2013).

3.1.3. Services

The service sector accounted for around 47 per cent of GDP in 2017, and largely consists of small-scale retailers and wholesalers, according to the Labour Force Survey 2011. The service sector is concentrated in Khartoum and Al-Gezira and reflects the economic centrality of these regions. In these states, around half of those engaged in services are in wholesale and retail trade, with a further 20 per cent in land transport services. Tourism has been steadily growing and is driven by visitors from the Middle East. According to the World Tourism Organization (UNWTO 2018), tourism numbers grew from 590,000 visitors in 2013 to 810,000 in 2017, of whom around half were from the Middle East. While underdeveloped, tourism is an important and growing source of income. For instance, spending by visitors grew from around US$770 million to US$1 billion over the same period. Notably, however, the vast majority of spending was accounted for by business and professional visitors, rather than visitors for pleasure and other personal reasons. According to UNCTAD (2017), tourism accounted for around 5.1 per cent of GDP between 2011 and 2014.

3.2. A difficult environment for trade

Unofficial cross-border trade, particularly in livestock, is driven by the high cost – both in time and money – of official cross-border trade. According to the World Bank's Doing Business Survey, Sudan ranks 185th out of 190 countries for ease of cross-border trading (World Bank 2018). Cross-border trade is characterized by high import and export costs, as well as time-consuming processes both in terms of border compliance and documentary compliance. According to the World Bank's Doing Business indicators, the average cost is around US$1,395 to export from Sudan and US$1,513 to import. Such a cumbersome border process encourages people to do trade informally to save on time, money and taxes.

Regional disparities are vast and represent a mix of market-led development. Khartoum is the capital and service-sector centre. The White Nile and Blue Nile rivers facilitate agricultural production in the eastern states; the rivers feed into the Gezira Scheme – one of the largest irrigation projects in the world – south-east of Khartoum, as well as connecting to the Roseires Dam and Sennar Dams, which provide much of the country's electricity. This has resulted in the facilitation of fertile conditions favourable for agricultural production and economic growth, which is a stark contrast to the desert regions in areas to the north and north-west, including parts of the Darfur states. These regions are reliant on rainfall for agriculture and are highly vulnerable to drought and famine. As a result, there is a close correlation between the Nile Rivers and regional poverty profiles (AfDB 2018).

3.3. Internal conflict has led to substantial displacement of persons

Internal conflict is a major impediment to economic growth, resulting in widespread displacement as well as reduced economic output in affected regions. The Internal Displacement Monitoring Centre (n.d.) suggests there were 2.1 million internally displaced persons (as a result of violence and conflict) in Sudan as of the end of 2017, and according to the UNHCR (2019), there were 724,000 Sudanese refugees abroad in 2019. On-going conflict takes place in the Kordufan and Blue Nile regions, and nomadic conflicts elsewhere in the country, particularly in Darfur and West Kordufan, have displaced thousands, impacted businesses and farmers' livelihoods, and disrupted nomadic pastoralist migratory patterns. At the same time, internal displacement has contributed to urbanization and the expansion of refugee camps both within Sudan and across the border. Government revenues have been impacted, economic growth hampered, and investment has stalled.

3.4. Poverty and inequality levels are high

Based on the National Baseline Household Budget Survey 2014–15, it was estimated that around a third (36.1 per cent) of Sudan's population were living below the national poverty line (AfDB 2018). In rural areas, the national poverty line was estimated at 35.5 per cent. Given the high propensity to be engaged in subsistence agriculture and the exposure to drought and other climatic conditions, rural areas were also exposed to severe food insecurity. At the same time, urban areas also exhibited high poverty rates (37.3 per cent), in part due to food security risks as a result of higher food prices during shortages.

Poverty rates are closely correlated to food insecurity and exposure to climatic shocks to farming, which in Sudan is reflected in the poverty distribution across states. Poverty rates were lowest in Northern State (12.2 per cent), Al-Gezira (18.3 per cent) and River Nile (19.9 per cent), partly reflecting their proximity to the Nile (AfDB 2018); these regions tend to have irrigated farmland and are less vulnerable to climatic shocks, and consequently, food security is adequate (Borgen Project 2017). By contrast, areas with the highest poverty rates – including South Kordufan (67 per cent), West Darfur (64.1 per cent) and Central Darfur (67.2 per cent) – have agricultural land that is more reliant on rainfall, with production heavily dependent on climatic conditions, and therefore, have a lower degree of food security.

Poverty incidence is directly correlated with educational attainment, with poverty incidence highest among those who never attended school (42.7 per cent) and incrementally lowering as educational attainment rises (AfDB 2018; UNESCO n.d.). This is particularly pertinent given that nearly half the working age population (ages 15-plus) are illiterate, and the gross primary school enrolment ratio, while improving, is still only round 80 per cent (UNESCO n.d.).

Income inequality, as measured by the Gini Index, has decreased marginally between 2009 and 2014. The Gini Index for Sudan in 2014 was estimated at around 0.292, down from 0.354 in 2009, indicating an improvement in income equality, both in urban and rural areas (AfDB 2018). 4 It is likely that this decrease in inequality is partially due to the decrease in oil revenues and therefore to the reduced oil dependence. As oil revenues tend to be concentrated and not widely distributed, a reduction in oil revenue is likely to have an impact on a country's level of inequality.

4 A Gini Index of 1 indicates a situation of perfect inequality, while an index of 0 indicates a situation of perfect equality.

3.5. Demographics and levels of human capital

In 2018, the Central Bureau of Statistics (CBS) estimated Sudan's population at about 42 million, with an anticipated growth of 1.2 million per year (equivalent to 2.8 per cent growth per annum). Sudan has a relatively young population, with 61.5 per cent under the age of 25. Urbanization is steadily increasing, with more than half the population forecast to be living in cities by 2050. In 2015, around 33.9 per cent of Sudan's population were living in urban areas, up from 20 per cent in 1980 and 28.6 per cent in 1990 (UNDESA 2018).

According to the UNDP Human Development Index, Sudan ranks 167th out of 189 countries and qualifies as having "low human development" (UNDP 2018). Sudan scores particularly poorly on health and education variables, despite incremental improvements in areas such as average years of schooling. Notably, when adjusted for inequality, the score drops further, reflecting inequalities such as female access to education and health. Raising education attainment and outcomes is an important long-term contribution to human capital development and diversification in Sudan's economy (Geiger 2014).

3.6. Migration dynamics in Sudan

Migration in Sudan is largely mixed in nature, reflecting a combination of refugees and asylum-seekers, different types of migrant workers (seasonal, temporary and permanent migrants), and both regular and irregular migrants. As a result, data on international migrants in Sudan changes from source to source, as does the number of refugees as part of the stock of international migrants. Numbers also change drastically one year to the next, even within the same source. For example, the Population Division of the United Nations Department of Economic and Social Affairs (UNDESA 2017b) estimated that there were 736,000 international migrants in Sudan in 2017, hailing mainly from South Sudan (43 per cent), Eritrea (27 per cent) and Ethiopia (10 per cent). In 2019, just two years later, UNDESA (2019) updated its estimate of international migrant stock to 1.2 million, with the three largest immigrant groups hailing from South Sudan (64.5 per cent), Eritrea (7.7 per cent) and Chad (7.7 per cent). Similarly, according to UNDESA (2017) there were 470,000 refugees in Sudan in 2017, but that figure jumps to 1.1 million in 2018 according to the United Nations High Commissioner for Refugees (UNHCR 2019). All these numbers should therefore be used to get a sense of orders of magnitude rather than as precise estimates.

According to the latest statistics on Sudanese migrants, around 36 per cent were located in IGAD Member States in 2017 (UNDESA 2017b), with the largest proportions in South Sudan (29 per cent) and Uganda (4.5 per cent). Sudanese migrants outside of IGAD countries were mainly in Saudi Arabia (22 per cent) and the rest of the Gulf States (13 per cent, including Yemen). Another substantial share (17 per cent) were estimated to be in Chad.

Sudan is a prime transit country because of its porous borders and its location on the Northern migration route (for African migrants headed to Libya, Israel and Europe), and because it is a stopover country for migrants moving from Central and West Africa to the Gulf States for economic or religious (pilgrimage to Mecca) reasons. As detailed in an IOM (2017) study on the motivations and intentions of migrants in Khartoum, it was found that the majority of migrants interviewed (55 per cent) said they had no intention of living in Sudan when they left their home country. After residing in Sudan, 79 per cent of interviewees stated that they wanted to move on to another country.

3.6.1. Refugees

Refugees make up the largest share of total migrant stock, from a low estimate of 470,000 in 2017 (UNDESA 2017b) to a high estimate of 1.1 million (including those in refugee-like situations) in 2018 (UNCHR 2019). 5 Many of these refugees are from South Sudan and Eritrea (852,000 and 114,000, respectively, according to the UNHCR). A growing number are also arriving from the Syrian Arab Republic. South Sudanese are a particular case as, following the secession, Sudan does not allow dual nationality for South Sudanese, but South Sudanese can enter and live in Sudan without restriction, and although they require work permits to work, they often engage in agricultural seasonal labour.

3.6.2. Return migration

In the mid-1970s, Sudan witnessed the migration of large numbers of its skilled and qualified workforce to the oil-producing countries of the Gulf and North Africa after the rise in global oil prices led to large-scale urban development projects in those countries. The return of these workers was captured by the Labour Force Survey 2011 through one of its migration modules, which measured both internal movement within Sudan and return migration after 2006. According to the Survey, an estimated of 43,000 Sudanese have returned from abroad, mainly from Saudi Arabia, Libya and Qatar.

During the last three years, many Sudanese have returned back to Sudan due to several reasons, such as the delocalization of jobs, the issuance of new laws in destination countries regarding residency and recruitment, and the impact of the Covid-19 pandemic on the economies of host countries. This return migration is a phenomenon that deserves the attention of researchers as well as decision-makers in the country.

3.6.3. Irregular migration and trafficking

Migration to and through Sudan is largely irregular (that is, without legal authority to enter and exit) with substantial risks of smuggling and trafficking. Refugees and asylum-seekers are particularly vulnerable to trafficking in Sudan, and these groups are unlikely to report abuses due to fear of retaliation by an employer or arrest or deportation by government authorities. Sudan was upgraded from Tier 3 to the Tier 2 Watch List in the US Department of State's 2018 Trafficking in Persons Report, meaning that the country still requires close scrutiny, despite government efforts to combat trafficking. At the same time, refugee camps in the eastern states and migration channels from Eritrea are exposed to trafficking, with evidence that communities in and around the camps, as well as cross-border tribes, including the Rashaida and Tabo tribes, are involved in the abduction and trafficking of Eritreans. Eritreans and Ethiopians living in Khartoum and housed in shelters are supported by their respective diaspora communities. In addition, South Sudanese refugees and Somali migrants represent a significant proportion of smuggled individuals who are at risk of trafficking.

3.6.4. Remittances

Official remittance flows account for less than 1 per cent of Sudan's GDP. Saudi Arabia accounts for 40.2 per cent of all official remittance flows into Sudan, despite accounting for a relatively lower share of official migrant stock, suggesting higher value per person (World Bank 2017). This is an indication of the economic nature of migration to Saudi Arabia and also to other Gulf States, such as Bahrain, Kuwait, Qatar and the United Arab Emirates.

5 The vastly different numbers highlight the need for accurate and consistent data, including with regard to terminology and measurement, for effective policymaking.

3.7. COVID-19 and migrant workers in Sudan [6]

Data on the impact of the COVID-19 pandemic in Sudan will be published imminently, but was not available at the time of writing this report. However, considering the extent of migrant workers in informal employment, and therefore with suboptimal protection, their vulnerability to the virus can be estimated as high, just as it is with Sudanese informal workers.

Although there are no data as of yet concerning how many migrant workers have actually been affected, there have been reports of xenophobic reactions linked to the virus. However, there have been no reports of pandemic-fuelled anti-migrant discrimination resulting in lay-offs or reductions or non-payment of wages. Although, as with national workers, migrant workers working on their own account have seen their activities and incomes reduced as a result of COVID-19-related measures.

There is no difference in access to health services between nationals and migrants or migrant workers. The Government, through the Ministry of Labour and Social Development (MOLSD) and Ministry of Interior, have extended visas to all migrant workers.

6 This an early qualitative assessment, following the methodology set out by the ILO's Policy Brief of April 2020 "Protecting Migrant Workers during the COVID-19 Pandemic - Recommendations for Policy-makers and Constituents". It is available at: https://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_743268.pdf.

Chapter 4

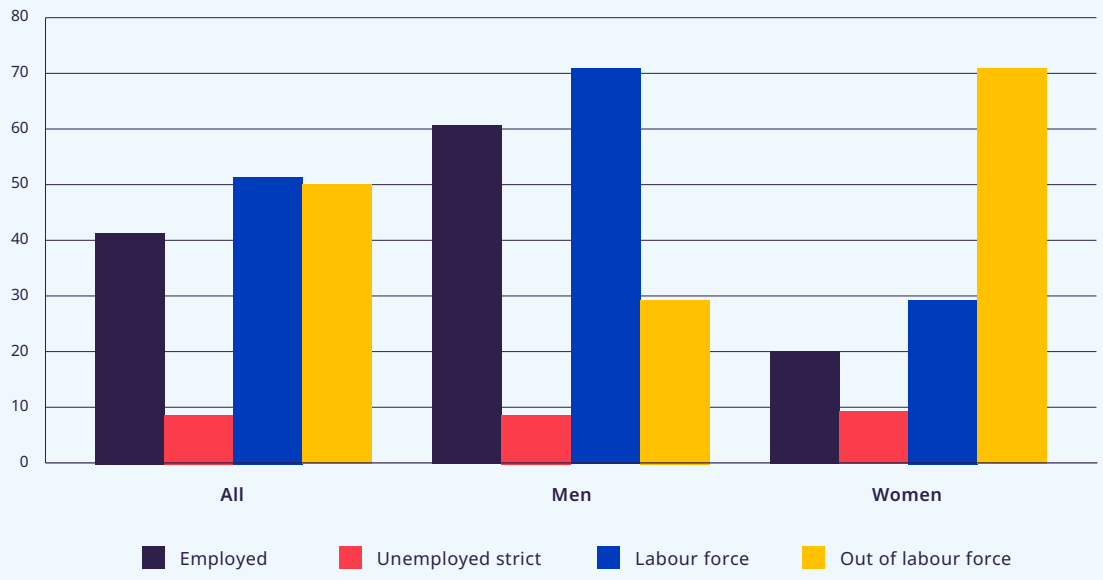
Labour force characteristics

This chapter provides an analysis of labour force characteristics in Sudan and is structured as follows: Section 4.1. outlines the overall labour force including the state of employment by sector and status; Section 4.2. provides a snapshot of the labour market characteristics of migrant workers, as derived from primary data collected as part of this study as well as secondary data; Section 4.3. examines the skills composition of the Sudanese labour market including that of as well as the skills composition of migrant workers in Sudan; and Section 4.4. summarizes the findings of the chapter in relation to labour market supply in Sudan.

▶ 4.1. The labour force

The last labour force survey in Sudan was run in 2011. It established Sudan's labour force at 8.9 million. 7 However, with population growth estimated at 2.9 per cent per annum between 2011 and 2018, ILO modelled estimates put the labour force at nearly 11 million in 2018. 8 The labour force participation rate was estimated at 50.5 per cent of the working age population (ages 15-plus) in 2011 (figure 1, below). This rate is relatively low for Sub-Saharan Africa and is one of the lowest of all the IGAD Member States, but comparable to that of South Sudan and Somalia. 9 The low overall rate is largely the result of low female labour force participation, which at 28.9 per cent, is 41.9 percentage points lower than the male rate of 70.8 per cent.

▶ **Figure 1.** Economic activity status of the population in Sudan (15 years and above), by sex, 2011



Source: Sudan Labour Force Survey 2011 (Ministry of Human Resources Development and Labour and ILO 2014).

7 Unless otherwise stated, all labour market data provided in this chapter are from the Labour Force Survey 2011.

8 ILO modelled estimates are based on the ILO's Trends Econometric Models and use GDP growth and population growth alongside available household survey data to extrapolate labour market trends over time. Due to the adjustment based on these additional sources, the data is not comparable with labour force survey findings. In this instance, the study uses the growth rate in labour supply from the ILO modelled estimates as indicative only.

9 On the basis of ILO modelled estimates.

There is also a substantial regional divide in the country in terms of labour participation (see table 5). Northern State had the lowest labour force participation rate in the country at 41.2 per cent in 2011, driven by one of the lowest female participation rates at 13.4 per cent. Red Sea, River Nile and Kassala states all also had particularly low overall participation rates, at 43.3 per cent, 46.4 per cent and 45.2 per cent, respectively. These were regions with corresponding low rates of female participation.

Table 5. Labour force participation rate (ages 15-plus) by state, rural/urban area and sex, 2011

	Urban			Rural		
State	All	Male	Female	All	Male	Female
Sudan	**46.8**	**66.8**	**26.1**	**52.8**	**73.3**	**30.7**
Northern	46.4	77.5	19.0	40.1	70.3	12.1
River Nile	48.4	74.6	22.1	45.2	77.1	11.5
Red Sea	43.9	70.0	17.0	42.7	73.3	6.7
Kassala	44.0	75.0	18.1	45.7	75.9	2.7
Al-Gadarif	47.6	68.3	25.1	53.6	78.8	26.3
Khartoum	46.3	64.3	27.0	45.6	74.9	12.7
Al-Gezira	45.0	64.2	25.8	46.1	71.4	20.3
White Nile	40.7	66.6	14.3	44.1	74.0	10.9
Sinnar	47.1	70.9	21.9	44.0	70.0	13.9
Blue Nile	51.3	75.7	27.9	54.6	81.6	24.3
North Kordufan	51.8	76.5	26.1	65.4	79.4	51.6
South Kordufan	54.2	73.5	36.8	59.7	75.8	42.2
North Darfur	49.7	62.6	36.4	52.3	60.4	43.7
West Darfur	52.8	59.6	45.5	69.8	69.1	70.5
South Darfur	47.4	62.6	31.2	66.2	72.5	59.3

Source: Sudan Labour Force Survey 2011 (Ministry of Human Resources Development and Labour and ILO 2014).

Again, despite women having a lower labour force participation rate than men, those that were in the labour market are also more likely to be unemployed. In 2011, the unemployment rate for women was estimated at 32.1 per cent, more than double the rate for men at 13.3 per cent. Unemployment is also particularly problematic for urban youth, with three-quarters of female youth in urban labour markets likely to be unemployed.

Overall, around a third of youth (ages 15–24) in the labour market were unemployed (33.8 per cent), compared to 14.5 per cent of their adult (ages 25-plus) counterparts.

Long-term unemployment reflects a chronic lack of productive opportunities for the labour force. Nearly two-thirds of the total unemployed in Sudan has been unemployed for 12 months or more. This was even higher

in urban areas, where around 85 per cent had been unemployed for 12 months or more (compared to 43 per cent in rural areas). Long-term unemployment is also associated with discouragement and dropping out of the labour force altogether – that is, being willing and available to work, but no longer looking for work, which are otherwise classed as inactive. [10]

An estimated 7.3 million people were employed in Sudan in 2011, equivalent to 41.1 per cent of the total working age population. The gender segmentation is again evident in the employment-to-population ratio (defined as the proportion of the working age population in employment), which was higher for men (61.4 per cent) than women (19.6 per cent).

▶ 4.2. Migrant workers

Agriculture is by far the main source of employment and livelihoods for Sudan's employed population, for both men and women (see table 6). Around 44 per cent of Sudan's employed population are engaged in the agriculture sector (compared to 15 per cent in industry and 41 per cent in services), many of whom are in subsistence crop farming. There is vast regional variation for agricultural employment as a share of total employment, ranging from 6.6 per cent in Khartoum to over 60 per cent in a number of the Darfur and Kordufan states. Women working in the agricultural sector are most likely to be contributing domestic farming activities, with reduced access to markets and reduced opportunities for earning their own income. Given that nearly 80 per cent of employed women in rural areas are engaged in agriculture, compared to 57 per cent of employed men, it suggests that men have more opportunities to transition into non-agricultural rural employment. Migrant workers also play a pivotal role in seasonal employment in agriculture, where there are no requirements for high skill levels (see Section 4.5.).

While oil and mining dominate output in the industrial sector, it contributes little to employment. In 2011, only around 1.4 per cent of Sudan's employed population were engaged in "mining and quarrying" despite the sector's contribution to economic growth. This was higher for men at 1.7 per cent, with an almost negligible number of women. Foreign workers in this sector are likely to be higher-skilled and specialized in the oil sector and working for larger companies, but such workers are not covered by the sample used for this study. While the oil extraction industry is not labour-intensive, there tend to be some employment spillovers, including in construction, both from wider infrastructure development and during the initial labour-intensive developments of key sites, as well as transport and service sector opportunities in and around sites.

Gold mining is potentially a major source of informal employment for artisanal and small-scale miners. The gold industry has been under a number of legal and regulatory restrictions since 2012, with restrictions on exports and obligations to the Central Bank of Sudan. All of which have contributed to smuggling and illicit production of gold to avoid the lower rates received via the official routes. Estimates on total production (both official and smuggled) suggest that employment in gold mining may account for 1 million people directly and indirectly (that is, through supply chain linkages), and possibly up to 3 million (World Bank and Ministry of Finance and Economic Planning 2016; Fatima 2018), covering 60,000 gold mining sites and 60 official gold processing firms (Environmental Justice Atlas n.d.).

Owing to the shortage of recent national labour statistics, it is difficult to assess the degree to which manufacturing growth has impacted employment in recent years, but it is likely to have increased by a marginal degree since 2011, in part as a result of the weak environment for private sector

10 Accordingly, a wider measure of labour underutilization helps gauge the extent of this phenomenon. ILO modelled estimates suggest that this group (known as the potential labour force) may account for a similar amount as the total unemployed.

development. In 2011, manufacturing accounted for around 7.8 per cent of the total employed population, according to the Labour Force Survey 2011 (see table 6). The sector was considerably more likely to employ men (accounting for 9.2 per cent of male employment) than women (3.0 per cent). Since 2011, there has been expansion in agro-processing and light manufacturing, partly supported by international organizations. Construction accounted for around 5.9 per cent of employment in 2011 and is likely to have increased since with large-scale projects.

Employment in services is driven mostly by wholesale and retail trade, which accounts for around a third of all services jobs. This is largely small-scale own-account work. Nearly 40 per cent of all services jobs were located in Khartoum and Al-Gezira.

For women, the highest share of employment (60.7 per cent) was in agriculture, forestry, hunting and fishing, followed by jobs in education (12.1 per cent), which are predominantly public sector jobs.

Table 6. Employment distribution by major industry, rural/urban area and sex in 2011 (%)

	All Sudan			Urban			Rural		
Major industry	**All**	**Male**	**Female**	**All**	**Male**	**Female**	**All**	**Male**	**Female**
Agriculture, forestry, hunting and fishing	**44.6**	**39.8**	**60.7**	**8.7**	**7.9**	**11.8**	**63.0**	**57.2**	**80.7**
Mining/ quarrying	1.4	1.7	0.3	1.1	1.2	0.5	1.6	2.0	0.2
Manufacturing	7.8	9.2	3.0	12.9	14.8	5.3	5.2	6.2	2.0
Construction	5.9	7.6	0.4	9.7	11.8	0.9	4.1	5.3	0.2
Wholesale and retail trade	13.3	14.6	9.2	19.4	19.4	19.2	10.2	11.9	5.1
Transportation and storage	8.2	10.4	0.8	13.3	16.0	2.0	5.6	7.4	0.3
Administrative and support service activity	2.2	2.3	1.7	4.2	4.2	4.3	1.1	1.3	0.7
Public administration	5.5	5.9	3.9	11.1	11.0	11.8	2.6	3.2	0.7
Education	4.9	2.8	12.1	7.7	3.5	25.0	3.5	2.4	6.8
Human, health and social work	1.9	1.3	4.0	3.5	2.2	8.9	1.1	0.8	1.9
Other [1]	4.4	4.2	4.0	8.5	8.0	10.3	2.2	2.5	1.3

Note: Percentages may not total 100 per cent due to rounding of figures.

[1] Other includes: Electricity and gas; supply of water and sewerage; accommodation and food service activity; information and communication; financial and insurance activity; real estate; professional, scientific and technical activities; art, entertainment and recreation; other service activities; activities of households as employer; and service of extra territorial organization.

Source: Sudan Labour Force Survey 2011 (Ministry of Human Resources Development and Labour and ILO 2014).

4.3. Status in employment

4.3.1. Wage employment

Around 42 per cent of total employment in Sudan is in wage and salaried jobs, that is, being employed as a paid employee (see figure 2). This largely reflects the degree of state-run enterprises in Sudan and the spread of industries in which they are involved. Wage employees are mostly found in agriculture (19.7 per cent of all employees), transport (17.4 per cent), construction (13.9 per cent), wholesale and retail trade (12.9 per cent) and manufacturing (12.9 per cent).

A higher share of men were engaged in wage employment (45.5 per cent) than among women (31.6 per cent). Wage employment for women was largely concentrated in non-market services (such as education, health and social work, public administration), which accounted for 63 per cent of female employees, compared to 22.6 per cent of men employees. Instead, men were more likely to be employees in all the other sectors, but with the most marked difference to women being in market services (for example, retail and wholesale trade), manufacturing and construction.

4.3.2. Vulnerable employment

Own-account workers or contributing family workers are considered as being vulnerable workers because they are less likely to have the regular incomes and job security of their paid employee counterparts and are less likely to have formal work arrangements. They also tend to have lower levels of education, which lowers their employability and capacity to engage in more productive jobs. Vulnerable workers accounted for more than half (51.3 per cent) of the total employed population in Sudan in 2011 (figure 2). Women are more likely than men to be in vulnerable employment: 66 per cent for women, with a relatively equal split between own-account work and contributing family work, against 47.3 per cent for men, with the vast majority in own-account work.

Contributing family work accounts for 33.4 per cent of all female employment, compared to 5.8 per cent of male employment. The majority of all contributing family work is in the agricultural sector, accounting for 96 per cent of contributing family workers. This is likely to reflect those working in subsistence farming and contributing to the family's agricultural production for their own consumption. Around 44 per cent of women working in contributing family work have a less than primary level of education.

Self-employment accounted for around 45 per cent of total employment, with a higher share for men at around 48 per cent, compared to around 35 per cent for women. Self-employment includes both own-account workers and employers. Men were more likely to be in both these categories than women, with 6.8 per cent of the total male employed population being employers (compared to 2.1 per cent of women) and 41.5 per cent of men as own-account workers (compared to 32.6 per cent of women). Around half of all self-employed workers were working in the agriculture sector, and around 20 per cent were in wholesale and retail trade.

Figure 2. Employment status in Sudan (15 years and over), 2011 (percent)

Source: Sudan Labour Force Survey 2011 (Ministry of Human Resources Development and Labour and ILO 2014).

4.4. Working poverty

Working poverty in Sudan is relatively low compared to its IGAD neighbours, but still accounts for a quarter of the employed population. Around 25.7 per cent of the employed population of Sudan are classified as being working poor under the international threshold for the moderately poor (less than $3.10 PPP 11 per day) in 2018, according to ILO modelled estimates. This was the lowest among countries in the IGAD region with data available (which excludes South Sudan and Djibouti). The same was true at the extremely poor threshold (less than $1.90 PPP per day), where the rate was estimated at around 7.2 per cent, which is considerably lower than other IGAD Member States, where, for example, the rate was estimated to be as high as 64.6 per cent in Somalia and 46.9 per cent in Eritrea.

Job security and status in employment have direct implications for vulnerability to poverty. Poverty incidence was found to be highest among unpaid (contributing) family workers, at 59.8 per cent, which is largely a reflection of subsistence farmers and household members engaged in agricultural activities for their own consumption. This group is the least likely to have savings, and those among this group working on land that relies on rainfall are also the most exposed to both food insecurity and

11 PPP = purchase power parity.

extreme poverty. Own-account workers were also found to have a high poverty incidence (40.1 per cent), which is likely to reflect their lack of job security and vulnerability to economic and environmental conditions (AfDB 2018). The lowest incidences of poverty were found among the retired population (17.7 per cent), the economically inactive (29.5 per cent) and employers (32.9 per cent), followed by paid employees (33.4 per cent). Those who are economically inactive and retired are more likely to be able to afford not to work, while employers and paid employees are more likely to have secure employment situations.

4.5. Migrant workers

4.5.1. Estimating labour migration movements in Sudan

There is a shortage of information on migrant workers in Sudan. The three main sources of secondary information are: (i) the Labour Force Survey 2011; (ii) work permit databases 12; and (iii) statistics and information published in secondary research, each of which has their limitations.

The Labour Force Survey 2011 is outdated and, while it contains information on migrant workers via a "country of birth" variable, the number of observations is too small to be used with confidence when the foreign born are disaggregated by nationality. The work permit database is maintained by the MOLSD and only captures migrant workers with formal arrangements – that is, migrant workers with work permits – which largely understates the number of migrant workers in Sudan and provides therefore a biased view of the characteristics of migrant workers.

The main secondary source of information that compiles statistics and information on migrant workers is the aforementioned 2017 IOM study, which was limited to migrants in Khartoum and also used definitions that are inconsistent with international standards. Nonetheless, some information from the IOM (2017) is presented in this section, but the chapter mostly relies largely on primary data and information collected on migrant workers in three locations: Blue Nile, Gedaref and Kassala, all of which are considered migrant-prone areas.

According to the MOLSD database, there were 29,000 migrant workers with work permits in 2017 (ILO 2020a). According to the GIZ (2008), around 80,000 Ethiopians cross over into Sudan every year to find seasonal employment into the states of Kassala and Gedaref. The Labour Force Survey 2011 estimates that there were around 66,750 foreign workers in 2011. As these diverse numbers suggest, there is currently no single source that can provide a reliable measure of stocks and flows of both migrants and migrant workers.

A key factor that complicates estimation of the number of migrant workers in Sudan, and therefore the contribution of migrant workers to the Sudanese economy, is the mixed migration nature of flows to the country. To begin with, Sudan is known as a country of origin, a country of destination, and particularly, a transit country for migrants. According to interviews carried out as part of this study, transit migrants stop for extended periods to earn money before continuing their journey. Further, Sudan hosts one of the largest refugee populations in the world. It is evident from secondary data as well as primary quantitative data and key informant interviews conducted as part of this study that there are a wide range of motivations for leaving one's country of origin and choosing to go to (or transit through) Sudan, where they end up as migrant workers. For instance:

12 Available from the Administrative Aliens System.

- **No single motivation or driving factor for migrating (mixed migration characteristics):** According to quantitative data collected as part of this study, around 63 per cent of respondents cited that the main reason for leaving their country of origin was for income opportunities, while around 22 per cent stated conflict-related reasons, and 15 per cent for personal and "other" reasons. In addition, according to IOM (2017), the main factors for leaving the country of origin to migrate to Sudan were insufficient means of earning a living in the home country. More than half of respondents in the IOM (2017) study stated that there were not enough jobs in their country of origin, or they did not earn enough to support their family. While at the same time, nearly half pointed to factors related to security and freedom of expression. 13

- **Refugees are often engaged in work, with or without permits:** According to key informant interviews conducted as part of this study, it was fairly common for refugees and asylum-seekers to be engaged in some form of productive activity despite the restrictions on work for these groups. Refugees are allowed to work on the condition that they obtain a work permit, which, as detailed in this report, can be a cumbersome process. Hence, it is likely that a large number of refugees are working informally.

- **Many migrants are working while transiting in Sudan before leaving the country:** According to the IOM (2017) study, only 23 per cent of interviewees (employed and unemployed) stated that they "strongly agreed" or "agreed" that they wanted to come to Sudan to live. This compares to 63 per cent who felt the same about the statement that they "only came to Sudan because it was the first country they could get to", and 70 per cent who stated that they "wanted to go to another country". This is consistent with the lack of opportunities available in Sudan and its primary position as a country of transit for migrants.

4.5.2. Characteristics of the migrant workers interviewed

Primary data collected as part of this study identified the migration status and length of stay of migrant workers from IGAD Member states. Namely, long-term migrant workers, who were in the country for more than six months, and whether these migrants had official documentation (regular migration status) or not (irregular migration status). The migration status was not captured for short-term migrant workers, who were in the country for less than six months. While a migrant worker's work permit status can be attached to their migration status, it cannot be assumed in all cases, and so data are only presented by migration status, not migrant worker status.

Characteristics of the migrant workers in the sample are represented in figure 3. This figure is designed to put a spotlight on the salient characteristics of the sample in review. Some of the labour market indicators are expressed out the total employed (291 respondents from the sample, see Section 2.3. for additional explanations), such as status in employment, occupational skill level, and formal or informal employment. Other indicators – age, migration status and educational attainment – are expressed out of the whole sample (401 respondents).

13 Specifically, more than half of IOM (2017) survey respondents (54 per cent) stated that they either "strongly agreed" or "agreed' with the statement that there were "not enough jobs or work at home", as a motivation for migrating to Sudan. Similarly, 53 per cent "strongly agreed" or "agreed" that they "did not earn enough to support their family", and 51 per cent that they "did not earn enough to meet basic needs". At the same time, nearly half of respondents (49 per cent) "strongly agreed" or "agreed" that they "did not have freedom of expression" in their country of origin. A similar amount (46 per cent) stated the same that they "did not have freedom of movement"; 41 per cent "feared arrest or detainment", 38 per cent cited "forced military (or civil) service"; 34 per cent cited "threat of safety due to conflict"; and 27 per cent cited "threat of safety due to beliefs".

The graph shows that the main status in employment was that of wage employment, but also that practically all working respondents (98 per cent) were working informally. Two-thirds (67 per cent) of the migrant workers interviewed as part of this study were employees, 21 per cent were employers and 7 per cent were own-account workers. The figure also shows that most migrant workers in the sample were engaged in occupations of a medium skill level, but that overall they had low levels of educational attainment, with 88 per cent having no more than a primary level education. Three-quarters of interviewees were of adult age (above 25 years).

The figure shows that nearly two-thirds (66 per cent) of long-term migrants in the sample had regular migration status.

▶ **Figure 3.** Selected characteristics of the migrant workers sampled

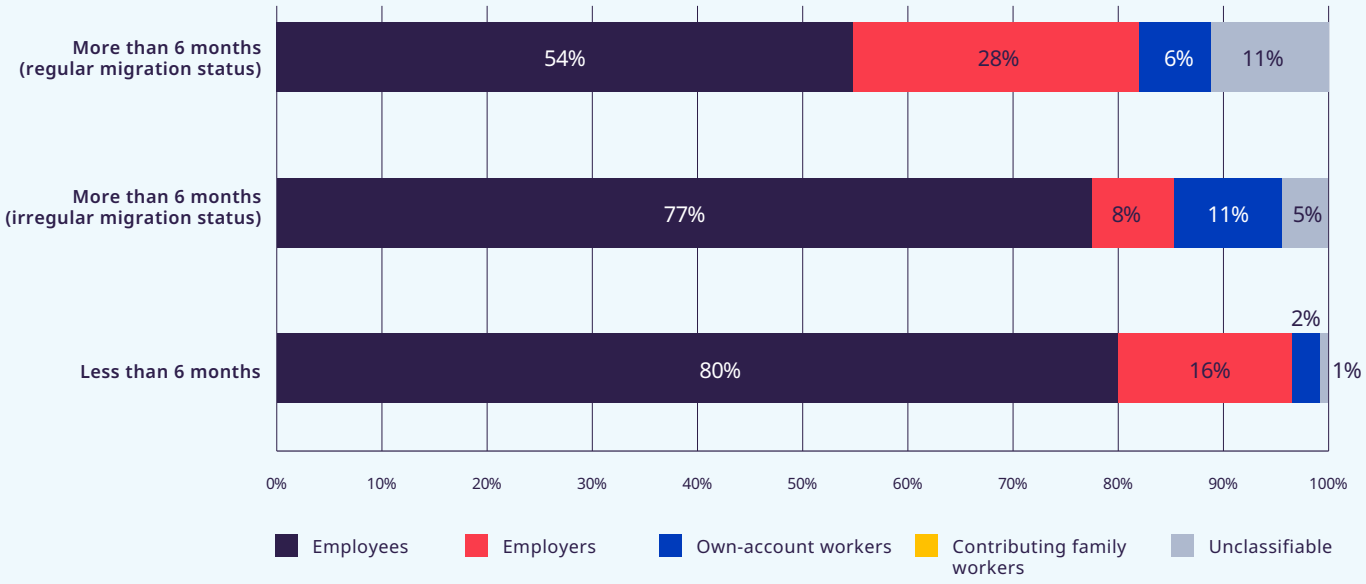
Note: The sample group for occupational skills level, status in employment, and informality only includes employed respondents (n=379). All respondents (n=440) are considered for education attainment, migration status, and age. Source: Primary quantitative data collection.

Status in employment of migrant workers interviewed

Disaggregating status in employment by migration status and length of stay (figure 4) showed that those who were in the country for more than six months and with regular migration status were more likely to be employers (28 per cent), compared to only 8 per cent of those with irregular migration status. Also, migrant workers with irregular status were more likely to be own-account workers (11 per cent) than those with regular migration status (6 per cent).

It is worth noting that findings from focus group discussions and key informants suggested that the close cultural ties between the migrant workers entering Sudan to work in seasonal agriculture meant that often there was little difference between migrant workers and Sudanese. It is a possible reason to explain why employers in those areas rely on migrant workers for the seasonal work, rather than employing Sudanese nationals from other, more distant parts of the country who may present more substantial sociocultural differences.

Figure 4. Status in employment, by migration status and length of stay (n=291)

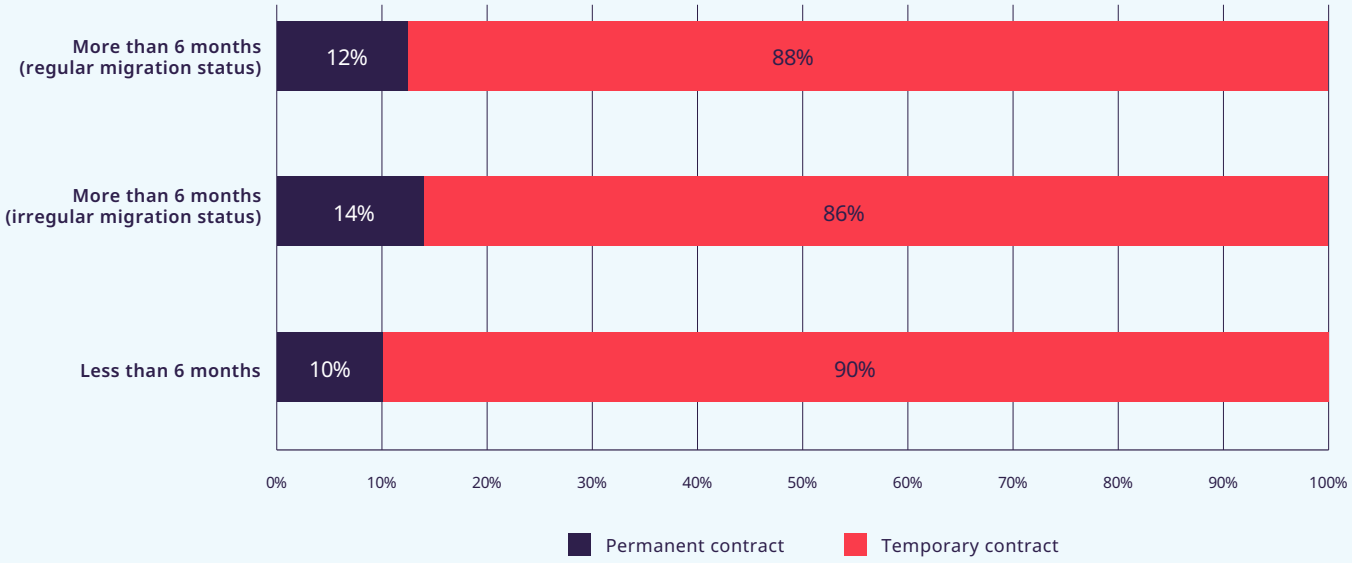


Source: Primary quantitative data collection.

Type of employment contract

All migrant workers in the sample were found to have similar types of employment contracts, regardless of the duration of their residence in Sudan, or their regular or irregular status, with between 86 and 90 per cent being under temporary contracts (figure 5). This is coherent with other findings, notably the 2017 IOM study, which found that 84 per cent of migrant workers interviewed in Khartoum had not signed any contract of employment and were therefore likely to be engaged in informal and temporary employment. 14

▶ **Figure 5.** Type of employment contract, by migration status and length of stay (n=291)



Source: Primary quantitative data collection.

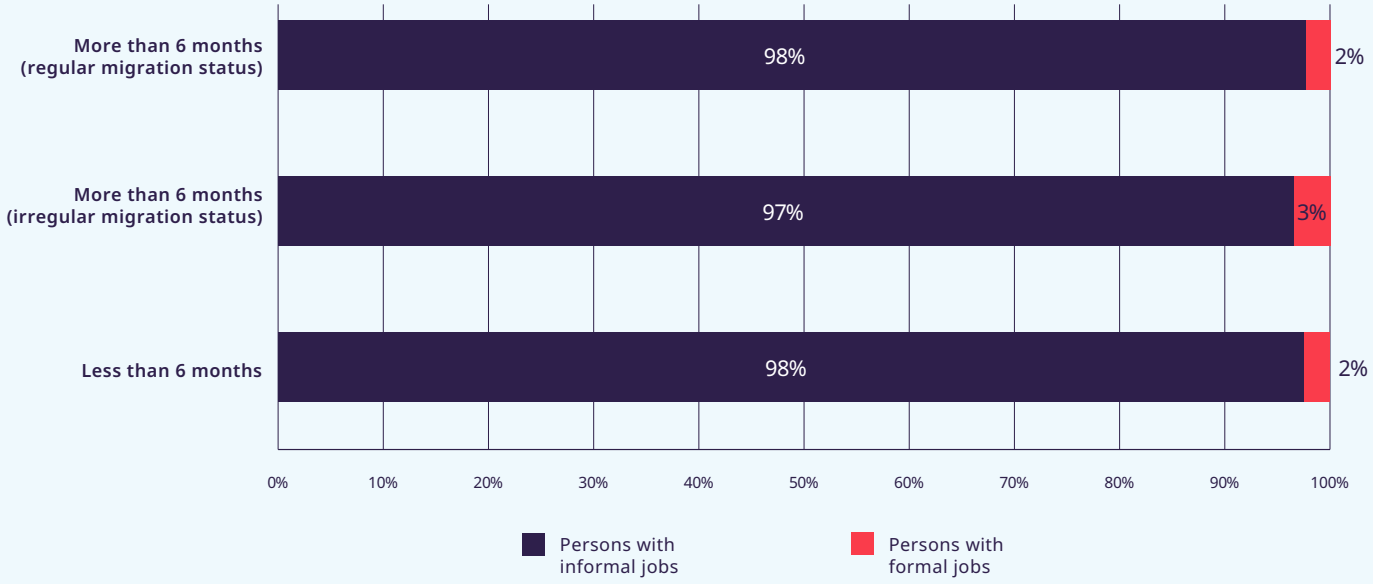
14 While 84 per cent did not sign a contract, this is not to say that oral contracts were not agreed upon. The likelihood is that these would be temporary contracts.

Informal employment

The incidence of informality is gauged through two metrics. The first metric estimates the share of informal employment (figure 6), whereby respondents' employment situations are assessed through criteria such as access to social security, paid leave and sick leave entitlements. The second metric assesses the unit of production itself (figure 7), on the basis of its registration status and whether or not the business keeps a book of account (see Module 3 from the questionnaire in Appendix II). The combination of the two provides insights not only into the prevalence of informal employment but also into the intersection and overlap of formality and informality in employment and in the economy.

Regarding informal employment, close to 100 per cent of the migrant workers interviewed reported their employment to be informal, regardless of the migration status or the duration of their residence (figure 6). This suggests strong decent work deficits in the employment opportunities available to migrant workers, and, as a result, points to their socio-economic vulnerability.

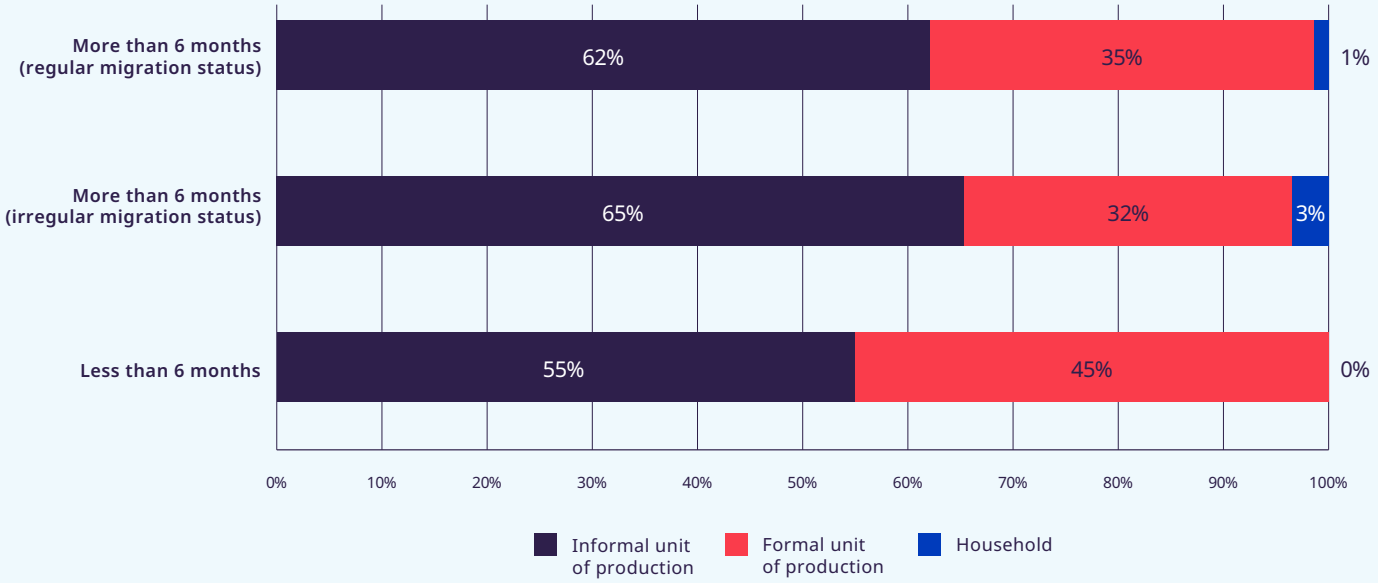
Figure 6. Informal employment, by migration status and length of stay (n=291)



Source: Primary quantitative data collection.

Even though it was found that almost all migrant workers were in informal employment, between 32 per cent and 45 per cent, depending on length of residence and migration status (regular or irregular) reported working in formal economic units (figure 7). Here too, the differences are not marked between the three categories, but nevertheless, the vulnerable position of the migrant workers from the survey with regard to the labour market is underlined: even when employed in formal units, their employment was informal, preventing them from securing the benefits or security usually associated with formal employment. This is an aspect that labour inspection should be paying attention to.

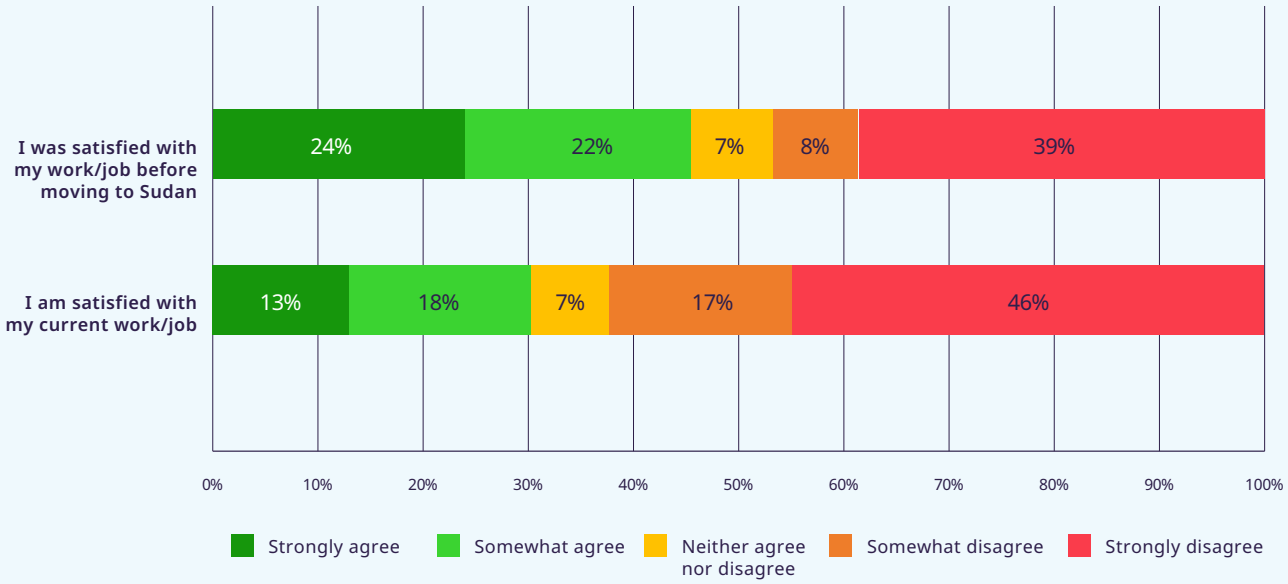
▶ **Figure 7.** Informal economy (unit of production), by migration status and length of stay (n=291)



Source: Primary quantitative data collection.

The data on informality and the picture of vulnerability presented in the two previous figures is corroborated by the findings of the 2017 IOM study. The IOM interviewed employed migrants in Khartoum and found that only 31 per cent of them "strongly agreed" or "agreed" with the statement that they were satisfied with their current job in Khartoum (figure 8). This compares with 46 per cent who stated the same with regard to their work/job in their country of origin before moving to Sudan. This suggests a worsening of the working conditions of migrant workers in Khartoum compared to their previous country of residence. It could also indicate that migrant workers, by expressing dissatisfaction with their current situation, do not consider Sudan as their final destination, thereby confirming Sudan as a transit country

Figure 8. Time-related underemployment, by migration status and length of stay



Source: IOM 2017.

4.6. ducation and skills composition of the labour force in Sudan

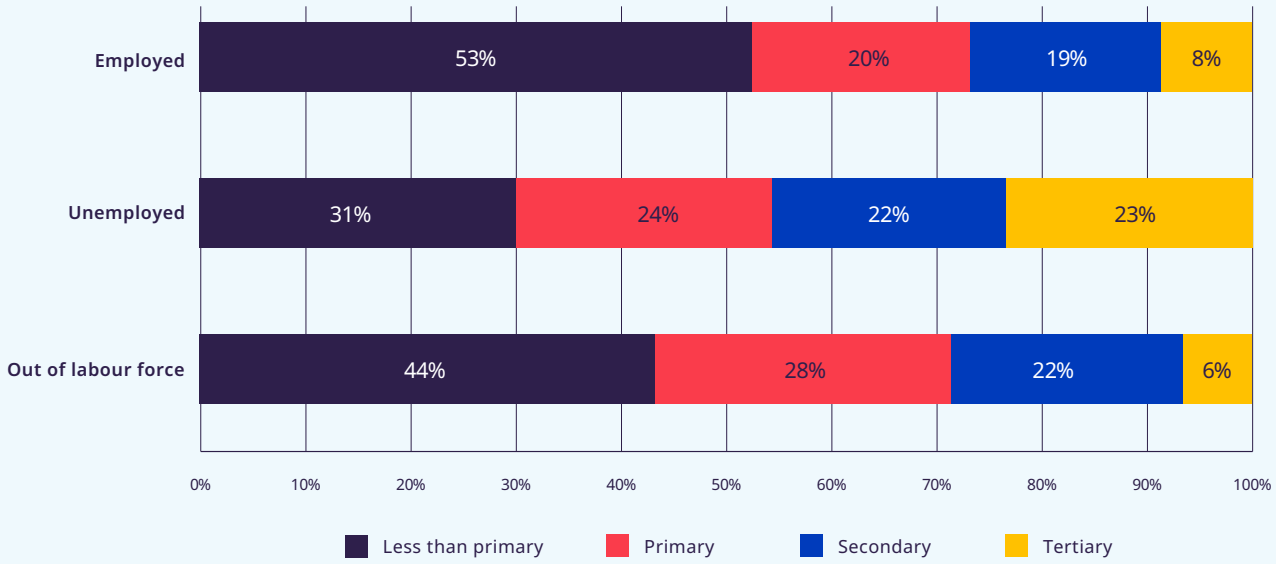
This section provides an overview of the education and skill composition of the Sudanese labour force. It looks at the education and skill composition of the labour force as per the Labour Force Survey 2011, and presents findings on the skills composition of migrant workers as per the primary quantitative data and key informant interview findings from this study. This section also highlights some implementation issues around the provision of technical and vocational skills training as drawn from key informant interview findings.

4.6.1. Educational attainment of the Sudanese labour force

According to the Labour Force Survey 2011, the majority (53 per cent) of the employed population had less than a primary level of education (figure 9); 20 per cent of the employed population had a primary school education as their highest level of educational attainment; around 19 per cent had a secondary level of education; and 8 per cent had a tertiary level of education.

Two differences can be noted between the educational composition of the employed population and that of the unemployed population: the share of people with a less than primary level of educational attainment was lower among the unemployed than among the employed (31 per cent and 54 per cent, respectively), and the share of people with a tertiary level of educational attainment was much higher among the unemployed than among the employed (23 per cent and 8 per cent, respectively). These differences at first appear somewhat counter-intuitive, as both show the unemployed population to be substantially more educated than the employed population. This is most likely a reflection that, firstly, a substantial share of the unemployed can afford to wait for a suitable job for some time, as opposed to those with low educational attainments, who likely hail from poorer families and who are less able to afford to be out of a job, and are therefore forced to engage in employment of any kind. Secondly, it is also an indication of either skills mismatch, whereby some people choose to specialize in skills not required by the labour market, or poor performance from the labour market, which is not able to provide employment opportunities in adequate numbers or quality to all those seeking employment. In the case of skills mismatching, better labour market information could help people make better choices with regard to specialization or offer insights to reform the educational and vocational offerings in the country. In the case of poor labour market performance, employment and economic policies are required to promote decent employment for all who seek it.

Figure 9. Educational attainment of the labour force in Sudan, by labour force status

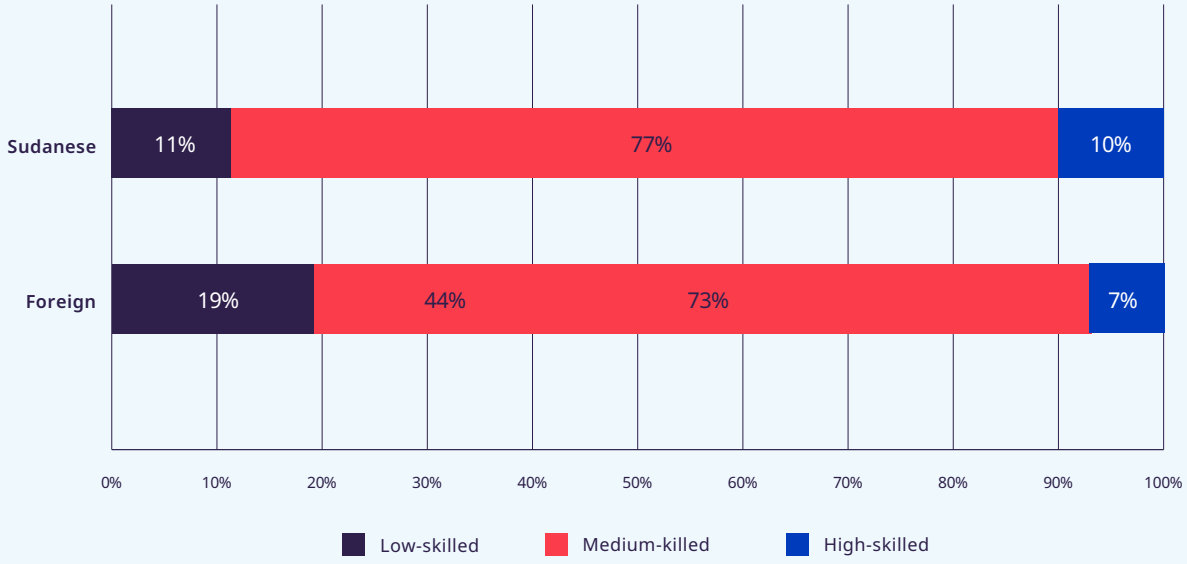


Source: Labour Force Survey 2011.

4.3.2. Occupational skill level

According to the 2011 Labour Force Survey, the occupational skill level by nationality was quite comparable between Sudanese workers and foreign workers (figure 10). For both categories, the bulk of employment was in medium-skilled occupations, including services and sales, skilled agriculture, and crafts and related activities (77 per cent for Sudanese and 73 per cent for foreign nationals). The share of high-skilled employment was also similar between the two categories, with Sudanese having slightly more opportunities in high-skilled occupations than foreign nationals (10 per cent against 7 per cent, respectively). However, there was more of a marked difference in low-skilled occupations, for which foreign nationals were at a particular disadvantage: 19 per cent of foreign national against 11 per cent of Sudanese, indicating, once more, the vulnerable position of foreign workers in the Sudan labour market and their disproportionate presence in low-quality jobs.

▶ **Figure 10.** Occupational skill levels of the labour force in Sudan, by nationality

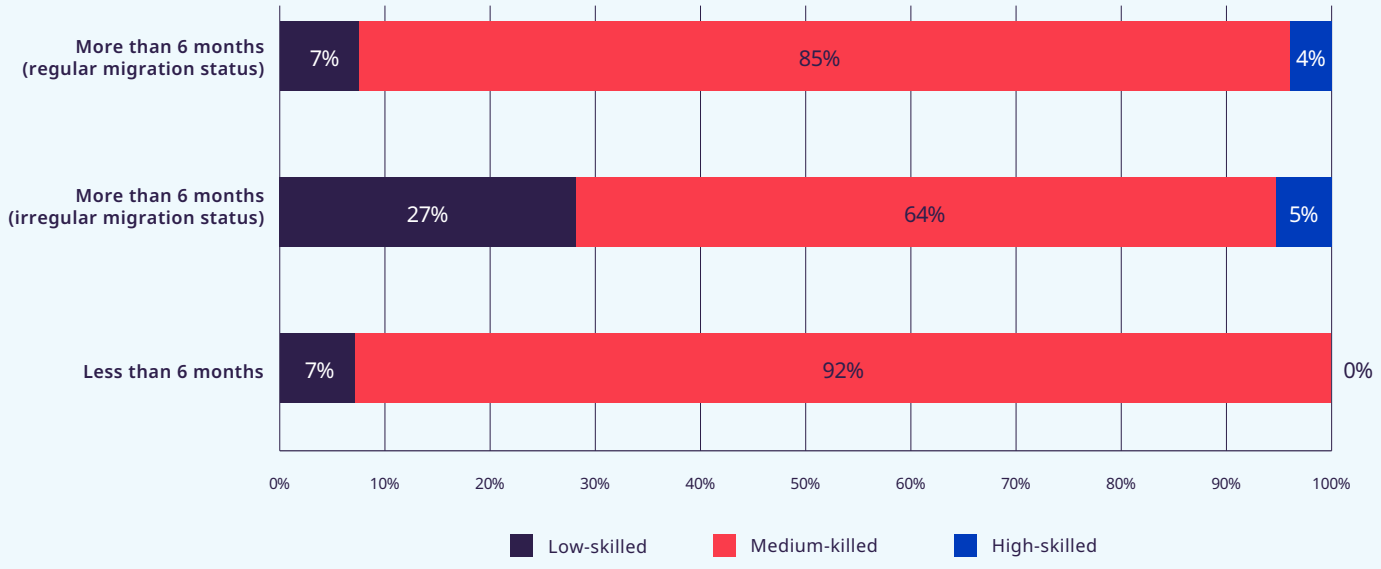


Source: Labour Force Survey 2011.

This study collected data on the occupational skill composition of selected migrant workers from IGAD Member States, and its findings seem to corroborate the points made previously. The migrant workers interviewed were for the great majority engaged in medium-skill occupation, with some variations between migration status and length of stay (figure 11). Long-term migrants, whether with regular or irregular status, were only marginally engaged in high-skill activities. A notable difference comes in the incidence of low-skilled occupations, as more than a quarter, 27 per cent, of migrant workers with irregular status were engaged in low-skilled occupations, compared to just 7 per cent for those with a regular status. There is clearly, in this instance, a positive return on regular migration status, which is echoed in the words of a focus group discussant:

> ***"There are no satisfactory jobs that meet the aspirations of migrant workers. The only available work is the hard work of cultivating, building and drilling. But work according to experience and qualifications is not available, and the reason is for the lack of documentation that allows migrants and refugees to be dealt [with] as local citizens." – Focus group discussant***

Figure 11. Occupational skill composition of sampled migrant workers, by migration status and length of stay (n=291)



Source: Primary quantitative data collection.

The lack of basic education prevents participation in any skills development training on offer in Sudan, however, there is also evidence that what training is on offer is highly constrained and in limited supply. The Supreme Council for Vocational Training and Apprenticeship oversees vocational training centres around the country, and these provide vocational training courses for both Sudanese and foreign nationals. There are a number of apprenticeship courses on offer, but these are for Sudanese only. In addition, the vocational training centres offer:

- specialized short courses available to Sudanese, immigrants and foreigners, and ranging from three to six months;
- transformational training, which is for people who want to change their previous profession to another, often more modern profession;
- a range of training modules that provide specialized training in specific skills that are in demand in the labour market;
- a vocational test course, which is held for workers who have gained practical skills through practice only without having received any training certificate; and
- courses that reflect technical changes in the labour market.

Such services offered by the vocational training centres are positive and appear responsive to changing labour market demands, but key informant interviews highlighted that the centres were severely under-resourced and already accommodating more students than each centre was designed for. According to the ILO (2020b), there are only 13 public vocational training centres in Sudan (and 98 technical secondary schools and 21 technical colleges), but there are many more private training centres. 15

"Most of the vocational training administration suffers from the fact that these centres are no longer accommodated for the large number of students. The trainings are designed to accommodate for 450 students, but now more than 900 students are accepted per semester, which is higher than the number permitted." – Key informant

Notably, there are signs from the key informant interviews that migrant workers are largely an untapped resource and do not receive the attention that they need to contribute positively to the Sudanese labour market. Firstly, key informants suggested that migrant workers were typically low-skilled and therefore were most in need of technical and vocational education and training because they are unable to find decent jobs. Secondly, that the focus, particularly with regard to refugees, is on meeting basic needs, such as the provision of food, housing and health, whereas training is neglected. This can prompt migrant workers to continue their migration passage onwards out of Sudan, but it also denies migrants workers the skills development needed to benefit their countries of origin as returnees.

"In terms of international migrant workers in Sudan, we call them cheap and unskilled labour, because the vast majorities do not have the skills to fill some jobs. Therefore, in accordance with international Conventions and local laws, Sudan should provide training opportunities for these migrant workers and qualify them to work in different sectors." – Key informant 16

15 See ILO 2020b for a more detailed overview of migrant workers' access to services and recognition of qualifications and skills.

16 In reality and contrary to what this informant seems to indicate, Sudan has not yet ratified any migrant worker-related Conventions (see table 7 below); although this is under study.

4.7. Conclusions

Labour force characteristics presented in this chapter suggest that Sudan's labour force is underutilized, both in terms of overall labour force participation levels, especially with low labour force participation by women, and also in terms of the quality of jobs. A lack of decent work opportunities corresponds with large numbers of the employed population in own-account work out of necessity, as well as widespread working poverty. The low levels of education that characterize those in and outside of the labour force also play to Sudan's disadvantage, limiting the skills composition of the workforce and the productivity of employment, and, in turn, limiting the capacity of the labour force to produce wealth and lift itself out of poverty.

The main type of migrant worker in Sudan is found to be seasonal agricultural workers who come to support the planting and harvesting season in the eastern states, before theoretically returning to their countries of origin. The reality is that many stay on and work in mining, most likely informally, or in other forms of casual work, or they continue onward travel using Sudan as a transit country for migration. A number of key informants stressed the importance of these migrant workers to the country's agricultural output, but equally, seasonal agricultural work is of a low-skilled nature and many migrant workers have the education levels to match.

Given the low-skilled nature of labour migration as well as the low levels of educational attainment within Sudan, it might appear surprising that seasonal agricultural work is not sourced from within Sudan. One reason is likely to be due to the sociocultural similarities and tribal links of people situated on either side of the porous borders of the Sudan's eastern states and Ethiopia, where the fieldwork took place. Given quasi-equal levels of education, preference is seemingly given to local people, whatever their nationality, rather than to Sudanese nationals from regions further afield.

Another way of explaining the important presence of migrant workers in these regions is that, even for the lowest quality jobs, migrant workers are worse off in terms of employment terms. Data in the section above has shown that migrant workers are systematically in a more vulnerable situation than Sudanese nationals. A race to the bottom may be at play even in these poor areas.

The lack of higher-skilled migrant workers limits the potential for skills transfer and other such benefits to the host communities; however, key informants also highlighted that migrant workers were an underutilized resource that could offer more to Sudan's labour market if governance systems permitted it. To some extent, this is confirmed by some data collected as part of this study, which showed that as migration status improved, so did the terms of employment of the migrant workers, albeit marginally.

Generally, the data have also shown evidence of skills mismatch, which point to the absence of recent and reliable labour market information and a lack of evidence-based labour market policies.

Chapter 5

Job creation and the private sector

As detailed in previous sections, much of Sudan's economic activity is supply driven, characterized by low-productivity agriculture and services, and with high incidence of own-account work. Further, low levels of education limit workers' ability to take part in skills development, and consequently the skills base of the country is too limited to foster a sustainable structural transition toward higher productivity through innovation and the application of new technologies.

While job creation and the composition of labour demand is most accurately gauged by vacancies or employers surveys and through information collected by public employment services and labour ministries, such information is not readily available. It is therefore necessary to use proxies, such as the state of the business environment and the conduciveness for job creation, as well as forecasts and analyses to gauge the potential expansion of various sectors and their potential for job creation.

This chapter is structured as follows: Section 5.1. outlines sectoral growth initiatives and prospects; Section 5.2. presents an overview of the private sector and the business environment in the country and the capacity for creating jobs; Section 5.3. concludes.

▶ 5.1. Sectoral growth initiatives and prospects

Sector-level growth forecasts can help identify where job creation may occur in the medium term. This can also be considered in the context of the state of structural transformation. In the case of Sudan, structural transformation – defined for the purposes of this report as "the transition of an economy from low productivity and labour-intensive economic activities to higher productivity and skill-intensive activities" (UN-HABITAT 2016) – has taken place in recent years, however, progress was stalled with the loss of oil production sites and subsequent drop in industrial growth following the secession of South Sudan in 2011. This bodes poorly for the creation of new jobs in the medium term. Faced with these circumstances, the Government of Sudan and international organizations have implemented a number of initiatives to bolster structural transformation, but the impact on jobs is not yet clear.

Agriculture is the largest purveyor of jobs, but suffers from low productivity

Agriculture is likely to continue to account for a large share of employment, with little by way of new value-added jobs. The sector suffers from under-investment and low yields, according to the World Bank (2015), and improved agricultural productivity would require a focus on centralized markets, subsidies, and the promotion of fertilizer usage. A number of international organizations have worked closely with Sudan to improve agricultural resilience and agricultural productivity, and have made strides in this area. This includes the Food and Agricultural Organization (FAO), which developed a strategy closely in line with Sudan's Second National Five-Year Strategic Development Plan (2012–2016) and the Agricultural Revival Programme (2008–2014) (FAO 2015). There are also efforts with the IGAD-led Sudan Country Programming Paper – To End Drought Emergencies in the Horn of Africa and the Darfur Regional Authority's Darfur Development Strategy. The Government of Sudan has developed a national adaptation plan in collaboration with United Nations agencies and other stakeholders to address the long-term challenge of global warming and hotter climates in Sudan that will increase the propensity and severity of droughts (WFP 2018).

The lack of agricultural productivity is an impediment to overall economic growth and highlights the importance of agro-processing to help provide value-added opportunities to rural communities as well as diversify exports. The United Nations Industrial Development Organization (UNIDO) has been working with the Government of Sudan on supporting value-added growth in agro-commodities through sustainable agribusiness, including the recently launched project Fostering Inclusive Economic Growth in Kassala State

through Agro-value Chains Development and Access to Financial Services, in partnership with the Italian Agency for Development Cooperation.

In the eastern states, the reliance on migrant workers for agricultural seasonal work is likely to continue, as interviews with key informants underline long-standing agreements (official or tacit, as further explained in Section 6.4.) and sociocultural ties to explain the demand for migrant workers over Sudanese nationals. Once seasonal employment has ended, information collected during interviews suggest that migrant workers would often go to work in mining.

> ***"Many of the migrant workers who come here are unskilled labour. Now they go directly to work in gold and copper mines in different states of Sudan because mining work does not require many skills, but is traditional mining. By the end of the agricultural season and by the end of the autumn, many migrant workers are moving to work in the mining of gold mines and other mines." – Key informant***

Industry reforms are engaged

International support is helping the Government of Sudan to bolster industrialization. The Industrial Modernization Programme of the Republic of Sudan (IMPS) was developed and launched in 2013, in cooperation with UNIDO, to bolster the business environment for industrial growth, namely through industrial policy, institutions and support services (UNIDO 2016). UNIDO also assisted the Government in the organization of an investment forum to increase foreign and domestic investments and partnerships in priority industrial sectors, including leather and leather products, fisheries, edible oil and groundnuts, fresh fruit and vegetables, cotton ginning and spinning (UNIDO n.d.). Under the IMPS, vulnerable groups received special attention for technical and vocational training, with a focus on internally displaced persons, youth and women (UNIDO 2016).

Despite these efforts, external vulnerability is still a major factor for uncertainty in the economic outlook. Modest growth projections for the coming five years reflect external sector risk as well as exposure to environmental shocks. GDP growth averaged -1.2 per cent from 2011 to 2018, down from 2.8 per cent in the pre-secession years of 2004–2011 (IMF 2019). Speculations around Sudan's economic growth projections vary from forecasts of 2–3 per cent over the coming years (EIU 2019) to a prolonged period of negative growth and recession (IMF 2019). Much of the uncertainty lies in Sudan's external sector vulnerability and currency pressures (a managed exchange rate system has seen multiple currency devaluations, impacting import prices of essential goods) combined with the lack of economic diversification and exposure to international price fluctuations.

5.2. Private sector and business environment

Job creation requires – among other prerequisites – a business environment that facilitates private sector growth. The business environment in Sudan is not very conducive to private sector growth. While the private sector has expanded over the past two decades (AfDB 2017; IMF 2017), aided by privatization of historically state-run enterprises, the business environment is hampered by major obstacles that are both nationwide and regional in nature. These obstacles include the exchange rate system and its impact on competitiveness and exports; internal conflicts and their implications on businesses; as well as the concentration of enterprises in specific sites, predominantly Khartoum.

> ***"Lack of vibrant private sector is one of the main contributing factors to scarcity of jobs." – World Bank and Ministry of Finance and Economic Planning 2016, p. 2***

Private sector development in Sudan is inhibited by a number of factors that compromise the business environment and its conduciveness to private sector development. To begin with, the exchange rate system overvalues the Sudanese pound, making exports uncompetitive. However, some exchange rate regime reforms are looking to allow certain areas of the private sector to trade at market prices (IMF 2017). Other key obstacles to development identified by firms include political instability, corruption and economic uncertainty (AfDB 2017). With additional identified obstacles including access to credit and the informal sector. These can be unpacked further, as follows:

- **Political instability:** Internal conflict is a major obstacle to private sector development. In certain regions – particularly Darfur, Kordufan and Blue Nile State – internal conflict has jeopardized private sector activities and the economic potential from natural resources and minerals. Internal conflicts have cut trade links, ended livelihoods for small farmers and interrupted migratory patterns of nomadic pastoralists. While the conflict has resulted in significant displacement, those who have stayed and continued to run their businesses have been subjected to higher taxes as a result of attempts by the Government to raise additional funds. At the same time, wider political instability is a negative factor for foreign investment, despite guarantees against nationalization and other appropriation.

- **Corruption:** Private enterprises across the country are largely small businesses or own-account workers. Somewhat outdated survey findings found that in 2009, the State ran only 2 per cent of all enterprises surveyed, however, these are likely to be the largest enterprises. While the private sector has expanded over the past two decades, aided by privatization of historically state-run enterprises, informal ties to the Government continue, with former officials running a number of large-scale private enterprises. Additionally, obligations towards the State, such as taxes and unpredictable regulatory changes (for example, export regulations), as well as foreign currency obligations (such as in the gold mining sector) have fuelled the informality of enterprises across the country, with illegal operations springing up and payoffs and bribes being paid to officials.

- **Economic uncertainty:** While the macroeconomic environment is a major deterring factor for foreign and domestic investors, perhaps the most inhibiting factor for firms is the exchange rate policy and its implications on exports, competitiveness and day-to-day business. A dual currency system with a managed exchange rate that has undergone repeated devaluations has resulted in unpredictability and has major implications depending on how over- or undervalued the official rates are. An appreciated currency has resulted in uncompetitive exports and cheap imports that have substituted similar domestically produced goods; while the devaluations have resulted in more competitive exports but also more expensive input prices.

- **Access to credit:** Credit to the private sector is low in comparison to other Sub-Saharan African nations and is major constraint on the private sector (IMF 2017). Further, the microfinance environment is still relatively undeveloped, with limited options for small- and medium-sized enterprises. There are also limited options even for firms with available collateral, as public-sector crowding out limits overall access to credit for the private sector. The lack of access to credit is a major impediment for agricultural productivity and for small-scale producers, who are unable to obtain the necessary credit needed to adopt more modern inputs.

- **Informal economy:** Like many of IGAD Member States, the informal economy is a major contributor to growth in Sudan. However, there is a lack of information on the informal economy, thereby limiting the ability to construct policies and legislation around informal job creation.

"[There needs to be] more attention for the informal sector in Sudan, which seems to have significant contribution to employment but information about the sector is insufficient to allow for further analysis. The PRSP [Poverty Reduction Strategy Paper] needs to examine the role to be played by this sector, particularly in boosting economic growth and employment." – World Bank and Ministry of Finance and Economic Planning 2016, p. 86

In a precarious environment for private sector development, new businesses are still set up, and despite the difficulties, entrepreneurs are found to be relatively optimistic. As noted above, self-employment in Sudan is largely a reflection of the lack of decent and productive opportunities available, but there are some positive findings from the Global Entrepreneurship Monitor (GEM), which looks at key entrepreneurial indicators in different countries and examined Sudan in 2018 (GEM 2018). Notably, it found that Sudan has above-average scores (when compared to the regional average) for job creation expectations among entrepreneurs, with close to 25 per cent expecting to hire six or more people within five years, compared to the regional average of around 15 per cent. It also found that Sudanese entrepreneurs had an above-average perception of opportunities. However, despite the above findings around perceived opportunities, conditions are not necessarily conducive to entrepreneurs, with poor scores across most indicators, including supportive government policies, entrepreneurship programmes and entrepreneurial education. Sudan's highest score was for internal market dynamics, which is partially a reflection of the opportunities available for entrepreneurs. This suggests that entrepreneurship in Sudan is largely necessity driven not the result of an environment conducive for starting a business.

The National Investment Encouragement Act, 2013, promotes foreign direct investment and outlines factors related to both domestic and foreign investors owning and developing businesses in Sudan. There are, however, different rules for the hiring of migrant workers in these investments. For instance, according to the ILO (2020a), the Ministry of Investment allows for 20 per cent of staff in an investment to be foreign, but the usual caveats apply, such as proof that no Sudanese could do the work. If the Ministry of Investment considers a project to be highly strategic, then up to 100 per cent of staff can be foreign, and in special economic zones, there are no restrictions on the number of foreign workers (ILO 2020a). Based on the primary data collected as part of this study (see Section 4.2.), work permits and official documentation are a necessity for running a business that employs others. The high share of employers who have regular migration status compared to those with irregular migration status suggests that running a business with irregular migration status is difficult to achieve.

5.3. Conclusions

There is a shortage of decent and productive employment opportunities in Sudan. Economic activity is largely supply driven, characterized by low-productivity agriculture and services, and with a high incidence of own-account work. Despite efforts by both the Government of Sudan and international organizations to facilitate industrialization and structural transformation, the education level and skills base of the country are too limited to achieve structural transition toward higher productivity through innovation and the application of new technologies.

Further, job creation requires a business environment that facilitates private sector development. The business environment in Sudan is not conducive to private sector development. While the private sector has expanded over the past two decades, aided by privatization of historically state-run enterprises, the business environment is hampered by major obstacles that are both nationwide and regional, such as the exchange rate system and its impact on competitiveness and exports, economic uncertainty, internal conflicts, corruption and access to credit. Major improvements in the business environment could facilitate job creation, but an initial step would be to develop labour market information on labour demand, particularly by implementing vacancies and employers surveys, and using information already available, such as the skills compositions of migrant workers entering and leaving the country.

While the findings of this chapter touch upon the wide range of initiatives to bolster structural transformation, the lack of a guiding strategy on decent and productive employment and job creation is noticeable. A national employment strategy would help shape these initiatives towards greater decent and productive employment creation outcomes, for instance, by focusing on employment-intensive interventions that maximize indirect and induced employment and job creation impacts.

Chapter 6

Improved governance for employment and job promotion

Effective and appropriate labour market governance is imperative to the good functioning of labour markets (see box 2). The effectiveness of labour market governance rests largely on the availability of regular, up-to-date and comprehensive labour market statistics and information. Migrant workers are also a crucial consideration in labour market governance, however, occupy a space that is also covered by labour migration governance. This chapter provides a critical assessment of selected labour market governance mechanisms (employment policy, labour market information, employment services and migrant workers) related to employment and job promotion, and how each can contribute to improved productive opportunities.

▶ Box 2. Labour market governance

Labour market governance refers to both employment governance and labour governance. The former is focused on pro-employment management and strategy and how to create decent and productive jobs; while the latter is focused more on the relationship between employers and employees, encompassing workers' rights, social protection, occupational safety and health. The traditional approach is to focus on:

i. human capital development, including skills development and improved capacity of the workforce, and/or

ii. private sector development, including business environment reforms and other policies designed to facilitate business growth.

These two approaches can be considered as supply-side and demand-side, respectively. Labour market governance is imperative to the success of each of these approaches and helps to find the appropriate balance.

This chapter is structured as follows: Section 6.1. provides an overview on Sudan's employment policy; Section 6.2. provides a critical assessment of labour market information; Section 6.3. presents an overview of the effectiveness of public employment services in regards to job-matching; and Section 6.4. looks at migrant workers in a labour market governance context and in relation to employment and job creation.

▶ 6.1. Employment policy and legislation

The most fundamental process to achieving a consistent and coordinated labour market governance approach is with a national employment strategy and policy. While the case has previously been made for a national employment policy, including the ILO-developed Roadmap toward a National Employment Policy for Sudan (ILO 2014), a standalone national employment policy is still being finalized. In the meantime, a number of employment and labour market initiatives have been incorporated into national strategies, most notably the Interim Poverty Reduction Strategy Paper (IPRSP) that was approved by the National Assembly in 2012, and subsequently implemented. The IPRSP was designed to support the Three-Year Salvation Economic Program, 2012–2014, and the Second Five-Year Development Plan, 2012–2016, as well as form the foundation of a full Poverty Reduction Strategy Paper (IMF 2013). The IPRSP was based upon four pillars, including: (i) developing human resources; and (ii) Promotion of economic growth and employment creation.

While the IPSRP focused heavily on the country's human resource base, it acknowledges the instrumental role of private sector development for job creation. The IPSRP's growth strategy, which was echoed by the ILO roadmap, advocated a focus on two key areas: "(i) targeted support for the agricultural sector, including livestock, forestry and fisheries, to promote growth and productivity change; and (ii) broad support for private sector development, with policies, institutions, incentives and infrastructural services to promote investments, innovation, productivity growth and employment creation in all sectors of the economy" (IPSRP, as quoted in ILO 2014, 41). This included roles for the Government, including efforts to:

- improve the confidence of the business sector in the management of the economy;
- help maintain the competitiveness of Sudanese firms;
- develop a policy and institutional framework that supports the strategic objectives of growth and poverty reduction; and
- to build a skilled labour force consistent with the demands of the labour market to foster innovation and productivity.

The next wave of national development strategy is likely to follow along the same vein with regards to employment and the labour market. While official documentation was not widely available for the Third Plan of the National Council for Strategic Planning, 2017–2020, media sources cited that the National Council for Strategic Planning sought to implement a Third Plan along many of the same lines as the Second Plan, thereby maintaining a focus on human capital investments to facilitate improved competitiveness of firms in domestic and international markets, by aligning human resources development (skills and education) with the national strategic interests. Special focus would be made on social safety nets and pro-poor policies to assist access by the poor to productive employment opportunities (SUNA 2017). There is, however, a need for improved employment governance through the development and active implementation of an evidence-based employment policy.

The Labour Code, 1997, is the principal source of labour governance in the country. The Labour Code, 1997, repealed the Manpower Act, 1974; the industrial Relations Act (No. 4), 1976; and the individual Labour Relations Act, 1981. The Labour Code is a comprehensive act that outlines a sweeping range of labour market legislation from child labour to wages, hours of work and occupational safety and health. Notably, it applies to equally to Sudanese nationals and foreign workers with the legal status to work in Sudan (see Section 6.3.), with some exceptions, including certain occupations.

> ***"There are no differences in the dealings between migrant labour and the local population, they can work anywhere and in any profession they want, except for jobs related to security and sovereignty. Migrant workers cannot work in the police or the army, or hold any positions in government departments or sovereign ministries, in accordance with the Labour Code." 17 – Key informant***

Sudan has ratified seven of the eight ILO fundamental Conventions (table 7), and all those ratified are featured to some degree in Sudan's legislation, particularly the Labour Code, 1997. While it is encouraging that Sudan has ratified most of the ILO fundamental Conventions, they do not necessarily comply with the standards set out in all of these Conventions. For instance, Sudan has ratified the Discrimination (Employment and Occupation) Convention, 1958 (No. 111), and has legislation that prohibits discrimination on the basis of race, sex, gender, disability, tribe and language – but does not protect against a range of other forms of discrimination. Notably, foreign workers without legal status have no protection under the law (see Section 6.3.).

17 According to the 2001 Law Regulating the Employment of Non-Sudanese, work permits may not be granted to a foreign national unless there is no Sudanese who can perform the work. When this is the case, resident foreigners are given priority over non-resident foreigners, and nationals of Arab and African countries are given priority over other foreigners. However, this law is seldom enforced in practice.

Despite legislation permitting it, workers have highly limited freedom of association and rights to organize. While legislation – including the Labour Code, 1997, and the Trade Unions Act. 2010 – allow the formation of unions and support the action of collective bargaining for resolving of disputes when a union exists (Labour Code, chapters XII and XIII) and outline the legitimacy of strikes (Trade Union Act, article 6(1)), the reality is that the Government heavily restricts freedom of association (Verité 2017) and there are few independent unions (Freedom House 2018). The Freedom of Association and Protection of the Right to Organise Convention, 1948 (No. 87), is the only ILO fundamental Convention that Sudan has not ratified.

Given the importance of seasonal agricultural work, particularly as a source of employment for migrant workers, the lack of coverage of agricultural workers under the Labour Code, combined with state-level legislation, amplifies the need for labour inspection, particularly in agriculture. Sudan has not yet ratified the Labour Inspection (Agriculture) Convention, 1969 (No. 129) – a priority governance Convention. Sudan has also not ratified the Domestic Workers Convention, 2011 (No. 189), which covers a key area particularly for female migrant workers, despite the MOLSD taking important steps toward protecting migrant domestic workers in Sudan, including by working closely with organizations like the ILO and the European Union to provide information and develop services for migrant domestic workers (European Commission 2020).

▶ **Table 7.** Sudan's ratification of ILO Conventions

Fundamental Conventions	**Status**
Forced Labour Convention, 1930 (No. 29)	In force (1957)
Freedom of Association and Protection of the Right to Organise Convention, 1948 (No. 87)	Not ratified
Right to Organise and Collective Bargaining Convention, 1949 (No. 98)	In force (1957)
Equal Remuneration Convention, 1951 (No. 100)	In force (1970)
Abolition of Forced Labour Convention, 1957 (No. 105)	In force (1970)
Discrimination (Employment and Occupation) Convention, 1958 (No. 111)	In force (1970)
Minimum Age Convention, 1973 (No. 138)	In force (2003)
Worst Forms of Child Labour Convention, 1999 (No. 182)	In force (2003)
Other relevant Conventions	**Status**
Migration for Employment Convention (Revised), 1949 (No. 97)	Not ratified
Labour Inspection (Agriculture) Convention, 1969 (No. 129)	Not ratified
Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143)	Not ratified
Part-Time Work Convention, 1994 (No. 175)	In force (2020)
Private Employment Agencies Convention, 1997 (No. 181)	Not ratified
Domestic Workers Convention, 2011 (No. 189)	Not ratified

Source: ILO n.d.-b.

6.2. Labour market information

A subset of labour market governance, labour market information provides the foundation for effective and evidence-based labour market governance and for labour migration and mobility governance. Systematic labour market information and analysis refers to institutional mechanisms that:

i. collect and compile data and information relevant to the labour market;

ii. act as a repository for such information;

iii. provide analytical capacities and tools; and

iv. facilitate institutional arrangements and networks. 18

While different bodies capture labour market information in Sudan, it is done so in a fragmented manner without coordination.

The foremost information source for labour market supply, the Labour Force Survey 2011, covered all sectors of the economy and all categories of worker, in line with ICLS standards. However, it was conducted in 2011, and an up-to-date labour force survey is imperative to obtain information on the current labour market structure of Sudan and thereby gauge any changes in the sectoral, occupation and skills compositions of the labour market.

Alternative sources of labour market supply include the Population and Housing Census, last conducted in 2008, and therefore quite outdated. The Population and Housing Census is also not a suggested source for labour market information, as it does not comply with ILO standard concepts and definitions, namely the ICLS standards. One of the roles of labour market information and analysis is to provide information, guidance and coordination on the collection, compilation, analysis and dissemination of labour market information, including on consistency in concepts and definitions. Despite this, the last Census did provide relatively detailed information on migrant workers and also on family members working abroad. While another Census was planned for 2018, it has been postponed.

Another source of labour supply data are administrative records. However, the information collected by public employment services is limited. Instead, more comprehensive data tends to be held by the MOLSD, which collects information on migrant workers through the work permit process. However, this means that data would be focused on authorized migrant workers only, with no information on those without work permits, which implicitly includes migrant workers who entered the country without paperwork.

> ***"The main problem here is that we do not have accurate statistics on the movement of migrant workers. The lack of resources and poor coordination among relevant actors contributed to the lack of sufficient information on the numbers, trends and migration characteristics of migrant workers."– Key informant***

There is a distinct shortage of up-to-date labour market information captured and compiled on labour market demand. The most effective sources of labour demand information are establishment surveys (Sudan conducted one in 2007), or vacancies and employers surveys, particularly for information on wages and labour costs. Although some specific studies are commissioned by the Sudanese Workers Trade Union Federation and the Sudanese Business and Employers Federation, there is no systematic gathering of information.

Instead, there is more information on the demand for Sudanese workers abroad. The Secretariat of Sudanese Working Abroad (SSWA) captures and stores information on the Sudanese diaspora, and the MOLSD captures and stores information on Sudanese migrant workers, including work contracts, skill levels and qualifications. Both sources of information can help ascertain the changing

18 Adapted from ILO n.d.-b.

labour demand for Sudanese workers abroad, but for this to be effective it needs systematic alignment and coordination.

A distinct shortfall on the demand side is the lack of a skills anticipation mechanism by which to forecast future skills needs and inform economic policy, education policy and migration policy. This undermines Sudan's ability to design active labour market programmes; inform curriculum development and technical and vocational education and training (TVET) programmes; and better manage both the inflows and outflows of migrant workers according to skill needs and mismatches.

A priority for the Government of Sudan should be to systematically strengthen labour market information and its analysis. Timely and up-to-date labour market information would allow for analysing the labour market and assessing the effectiveness of employment and labour policies, as well as provide a mechanism for coordinating data collection, compilation and dissemination among policymakers and other relevant stakeholders, including the statistics office, employers' groups, workers' groups, research organizations and international organizations. To this end, effective labour market information also requires the institutional foundations to allow for these different stakeholders – particularly social partners – to take part in and influence the agenda around labour market information.

6.3. Employment services

Employment services exist in Sudan, both to provide domestic employment services and overseas employment services. Public employment services, also known in Sudan as Labour Offices or Employment Services Centres assist with:

- registering jobseekers;
- counselling jobseekers;
- canvassing vacancies among employers;
- appraising jobseekers of job vacancies;
- canvassing among jobseekers and employers for jobseeker registrations and vacancies, respectively; and
- other types of referral services.

According to the Labour Force Survey 2011, only around 8 per cent of the unemployed had used a Labour Office to find work, with a similar amount contacting employers directly. Instead, the main method of finding a job, as stated by more than half of the unemployed in the survey, was via relatives. Notably, for around 15 per cent of respondents, the National Civil Service Recruitment Commission was their main method of finding work.

> ***"I think unskilled labour does not need many methods and ways to provide jobs. They are looking for work themselves and working in marginal sectors that do not generate much money for national employment agencies. So you find that national employment agencies are looking for highly skilled workers, and through them these agencies can make a lot of money" – Key informant***

According to key informant interviews, Labour Offices can also assist with the placement of migrant workers with employers in Sudan, particularly for types of workers that fall outside the scope of the Labour Code, 1997, including agricultural workers, casual workers and domestic workers.

> ***"We at the Labour Office are interested in providing work permits for migrant workers and Sudanese employees as well. With regards to migrant laborers, we do not go to them to get them work permits, but they often come to us in our offices and ask us to get them to work permits" – Key informant***

"National employment agencies have contributed significantly to the provision of employment opportunities for many migrant workers. These agencies operate under the Labour Code and are granted permits from the Labour Office, the Employment Administration for Non-Sudanese Workers, and there is a law regulating the work of these agencies." 19 – Key informant

As mentioned in Section 6.1. the federal structure of Sudan means that regulations and labour laws can be designed at the state level (except for the Law Regulating the Employment of Non-Sudanese (2001), which is defined at the federal level). As a result, in eastern states, including Blue Nile, Gedaref and Kassala, it is common for the Labour Offices to work directly with employers and employers' groups, such as farmers' unions, to help supply their labour needs. While these employers are expected to return the workers to their countries of origin, it is common that the migrant workers will be transported to and deposited at the border, where they may re-enter Sudan.

"Sudan has an excellent agreement with Ethiopia, for example. The agreement lines out how we need to organize work, trade and how to facilitate the movement of migrant workers. During the agricultural season, there is an agreement on how to facilitate the entry of migrant workers into border areas of the two countries." – Key informant, Kassala

While the Government does not manage an international placement service, it closely monitors and manages the outflow of labour migration. For Sudanese wanting to work abroad, while the Constitution permits all citizens to leave the country, the process is highly bureaucratic, with legal restrictions on exit for employment. To begin with, the Labour Code, 1997, states that "any Sudanese who seeks a job outside Sudan must obtain the permission of the [Ministry of Labour and Social Development]" (art. 14). The Ministry then verifies labour contracts and manages a registration database of migrants willing to work abroad (Di Bartolomeo, Jaulin, and Perrin 2012). Those wanting to work abroad also have to comply with conditions and guidelines stipulated in the 1990 Regulation of the Employment of Sudanese Working Abroad Act. Potential labour migrants also have to register at a range of other government agencies, besides the MOLSD, including the Secretariat of Sudanese Working Abroad (SSWA), who makes arrangements for the payment of special taxes and contributions, among other services.

Private recruitment or employment agencies in Sudan are mostly focused on the placement of Sudanese migrant workers overseas and a license is required from the MOLSD to operate. The Regulations of Operation for Employment and Recruitment Agencies, 2015, outlines the licensing system for employment and recruitment agencies. However, according to the ILO (2020a), although there are provisions for annual inspection, it is not clear to what extent they are monitored with regards to respect for migrants' rights. Further, it is not clear to what extent the licensing system for private employment agencies is enforced, and the licensing system does not appear to have been developed in cooperation with employers' and workers' organizations (ILO 2020a).

The ILO Private Employment Agencies Convention, 1997 (No. 181), states, "Private employment agencies shall not charge directly or indirectly, in whole or in part, any fees or costs to workers" (Article 7). Although Sudan has not ratified Convention No. 181, private employment agencies are not permitted to charge any worker a commission or request fees for employment (Labour Code, art. 9(1)); and according to the Regulations of Operation for Employment and Recruitment Agencies, 2015, doing so would constitute a revocation of the agency's license. However, there are recruitment and placement fees that are not all covered by the regulation, such as travel costs, which ultimately are fees the migrant has to bear and therefore can render migrants vulnerable to exploitation.

19 his not actually a law but a ministerial decree (Decree No. 9 for the year 2010)

6.4. Migrant workers

For a comprehensive overview of labour migration and mobility governance in Ethiopia, detailed information is provided in the parallel study An Assessment of Labour Migration and Mobility Governance in the IGAD Region: Country Report for Ethiopia (ILO 2020a). Certain key findings from this publication are highlighted in this section.

6.4.1. Labour migration governance

Labour migration is often cited in economic literature as a means of bolstering development for a country of origin, but on the condition that migration governance is well managed (UNCTAD 2018). Labour migration governance should in theory be able to support the labour market by allowing for management of mismatches between labour supply and demand, particularly around skills. As detailed in the previous section, the shortage of labour market information in general – and particularly on the skills of national workers, Sudanese migrant workers abroad and migrant workers in Sudan – limit the scope for any such rebalancing. The systematic strengthening of labour market information and analysis in Sudan would help consolidate this information, which in turn would help incorporate skills information into labour migration management. This process can be assisted by greater harmonization of qualifications, curricula and accreditation, particularly in TVET, between Sudan and IGAD Member States.

According to the ILO (2020a), the National Population Council, supported by the IOM, has initiated a process to develop a national migration policy. This included the formation in April 2017of a task force to develop the migration policy, which included participation from the SSWA and Ministry of Interior. According to the National Population Council, a labour migration policy will form part of the migration policy; however, this labour migration policy is not publicly available. The ILO (2020a) notes that it is unclear which relevant actors and government departments were involved in this labour migration policy development.

Given the mixed migration flows to and through Sudan, it is perhaps not surprising that there is substantial evidence that labour market participation by refugees, both with and (largely) without required work permits, is common. Key informants working in this area specify that while it is a priority to comply with formal processes (including medical and security checks) for facilitating employment for refugees, it is not uncommon for refugees to move in and out of camps to work, often using public transport and without work permits. Nonetheless, it is not straightforward for refugees to work in Sudan, and a relatively strict encampment policy limits integration with the labour market. Key informants estimated that there are around 80,000 refugees in camps in Sudan, with a further 300,000 refugees in the cities. This reflects a potentially rich and varied source of skills available in the country, and the positive contribution of refugees to the labour market should be pursued further.

> ***"The main priorities relate to ensuring that migrant workers are working here legally. They need to enter with the right papers and have the medical examination before working here. All this does not take a lot of time, but there are still a lot of migrants who enter illegally" – Key informant***

The ILO Multilateral Framework on Labour Migration includes among its non-binding principles the following guidance on a rights-based approach to labour migration: "[establish] transparent policies for the admission, employment and residence of migrant workers based on clear criteria, including labour market needs" and "[ensure] that temporary work schemes respond to established labour market needs, and that these schemes respect the principle of equal treatment between migrant and national workers" (ILO 2006, 13). However, it is relatively difficult to enter Sudan and to work legally with a work permit. A recent ILO (2020a) study highlights the multitude of laws and regulations in Sudan that impede the contribution of labour migration and mobility governance to support labour market needs. Further, Sudan has a highly protectionist stance towards foreign workers.

The 2000 Act on the Employment of Non-Sudanese states that a work permit shall not be issued if there is a Sudanese worker able to perform the task, following that, preference will be given to nationals of African and Arab States. The ILO (2020a) study also highlights the tax that Sudanese migrant workers are obliged to pay upon return to Sudan, thereby providing a disincentive to circular and return migration. Further, the entry visa requirements for business persons and short-term visits are detrimental to foreign investors and new business opportunities. The Act on the Employment of Non-Sudanese stipulates that it empowers the police to arrest without warrant any "transit passenger" who discontinues their journey without permission and detain them in police custody or release them in accordance with the Criminal Procedures Act, 1991 (art. 31c) (Babiker 2011).

6.4.2. Equal treatment of migrant workers

For migrant workers to contribute positively to the Sudanese labour market and as part of their integration into Sudanese society, there is a need for the protection of and equal treatment of migrant workers. According to the Labour Code, 1997, Sudanese workers and regular migrant workers in Sudan fall under the same legal framework and are subject to the same rights. Many of the key informants interviewed as part of this study reaffirmed this notion that there are no differences in the treatment of migrant workers and of nationals.

Box 3. Equality of opportunity and treatment for migrant workers with nationals

Article 6(1) of the ILO Migration for Employment Convention (Revised), 1949 (No. 97), provides that each Member for which this Convention is in force undertakes to apply, without discrimination in respect of nationality, race, religion or sex, to immigrants lawfully within its territory, treatment no less favourable than that which it applies to its own nationals in respect of: remuneration, membership of trade unions and rights to collective bargaining, accommodation, social security, employment taxes and legal proceedings related to matters referred to in this Convention.

Article 10 of the Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143), (Part II on Equality of Opportunity and Treatment) provides that: "Each Member for which the Convention is in force undertakes to declare and pursue a national policy designed to promote and to guarantee, by methods appropriate to national conditions and practice, equality of opportunity and treatment in respect of employment and occupation, of social security, of trade union and cultural rights and of individual and collective freedoms for persons who as migrant workers or as members of their families are lawfully within its territory."

Source: ILO Conventions Nos 97 and 143.

There are however, two significant considerations. First, the legislation refers only to regular migrant workers with work permits. However, despite there being little data to confirm numbers, regular migrant workers are estimated to represent only a small number of total migrant workers. Second, certain types of worker are omitted under the law, this includes agricultural workers and casual labourers. According to November 2017 data, there were around 29,000 migrant workers in Sudan with work permits (ILO 2020a), but the total number of migrants in the country in 2017 was 750,000 according to UNDESA (2017b) estimates. A case in point is the Sudan–Ethiopia corridor, where it was commonly cited in key informant interviews that there were more than 80,000 refugees (sometimes working) and around 80,000 seasonal workers per year (GIZ 2018).

It is worth noting that Sudan has not ratified the ILO Migration for Employment Convention (Revised), 1949 (No. 97), which facilitates equal treatment of migrants for employment, including around medical care, conditions at work and social security. Nor has it ratified the Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143). This is not to say that Sudan does not comply with these Conventions in principle. As mentioned above, the Labour Code applies fully to foreign workers with legal status, but those without regular status have no legal protection or avenue for redress (US Department of State 2018).

Only the Sudanese side has laws that regulate the way of obtaining treatment and litigation with respect to work and the difference of remedy procurement [between Sudanese and non-Sudanese]. There is a specific and detailed law for foreigners regarding their access to treatment and litigation before the courts inside Sudan." – Key informant

"The main challenges facing migrant workers and the State [include] the legislative and legal aspects of litigation, and the lack of clear legislation in this area." – Key informant

Sudan's legislation suggests a zero tolerance stance towards irregular migrant workers, including those who may have entered regularly but over-stayed their permit, or became irregular due to changing legislation or other means. Further, Sudan's tough stance towards irregular migrant workers may raise the vulnerability of these migrant workers to abuse and exploitation. The Act on the Employment of Non-Sudanese, 2000, lays out the punishments for workers operating without a work permit, which can entail up to six months in prison. However, the federal structure of Sudan means that states are able to set their own labour regulations, oftentimes facilitating the placement of migrant workers without permits.

The second main consideration is that a large part of labour migration is governed by informal rules and long-standing unwritten agreements. This is particularly the case for seasonal labour migration in the states of Blue Nile, Gedaref and Kassala. Seasonal labour migration is managed between farmers and supported by the Labour Office. Key informants regularly cited that while the arrangements were positive, the lack of formality in some arrangements and lack of institutional capacity can make it difficult to enforce and monitor labour migration.

"There are common local customs among the border states such as Gedaref, Kassala and Blue Nile State, which are meant to facilitate the entry of refugees and allow the passage of migrant workers." – Key informant

"According to the policy of the state, the employer who brings in the workers is supposed to return those workers to their country after the end of the working period. But all these laws are on paper and do not apply to reality. For example, some employers only bring workers to the border and once left there they return to Sudan again without permission from the authorities." – Priority area for labour migration, as cited by a key informant

In addition, there are disparities between federal legislation and state legislation. This can make it difficult to know the legislative regime of a particular jurisdiction, and migrant workers who took part in focus group discussions also highlighted the difficulties related to the absence of clear borders, both internationally and between states, the crossing of which could lead to them being held responsible for breaking rules without any realization that they were doing so.

"There are some local laws that relate to the management of labour migration, including the Non-Sudanese Employment Act, 2007, a special law for the state of Kassala. There is also the Asylum Regulation Act of 1974, which was amended in 2013. According to this law, no foreigner or refugee is allowed to engage in any occupation or employment without the permission of the Labour Office." – Key informant

Female migrant workers in Sudan often arrive irregularly from nearby countries like Ethiopia, South Sudan and Eritrea, falling into exploitative situations along the way (Grabska 2016). Due to a lack of resources and knowledge, as well as a desire to remain hidden from authorities, these women often find themselves in situations of relative disempowerment (David, Bryant, and Larsen 2019). This increases their vulnerability to exploitation, violence and abuse both during the migration journey and after. Several research studies, including by the ILO (2020a) and Grabska (2016), indicate that female migrant workers participate in precarious and informal jobs in the agriculture, services and domestic sectors in Sudan. Although exact numbers are unavailable, female migrant workers in these informal spaces are more likely to face exploitation, with some forced into sex work and/or experiences of debt bondage (ILO 2020a). Several measures can be taken to prevent exploitation and protect female migrant workers, especially those in the informal sector, including providing information to migrant workers and developing policies, laws and regulations that protect female migrant workers.

6.5. Conclusions

In terms of labour market governance, there are a number of substantial gaps that require addressing in order to achieve employment job promotion. Firstly, while the development of a national employment policy should be applauded, it appears that its development was done without sufficient consultation. Such consultation should involve a wide range of relevant government areas and ministries and be conducted in a tripartite setting with inputs from employers' and workers' groups, and potentially with inputs from labour market experts and other relevant external stakeholders. It is, however, possible to rectify matters concerning the draft national employment policy by engaging in tripartite-plus consultations before signing or adopting the policy.

Secondly, the national employment policy and any employment promotion components of national development strategies appear to have been developed without a sufficient evidence base. This assumption is made on the basis of the widespread lack of labour market information and analyses in Sudan and the lack of any coordination and systematic analysis. Improvements in this regard hold the potential to drastically improve the effectiveness of both labour market governance and labour migration governance, particularly through better coordination concerning the data that are already being captured but not necessarily widely shared among various relevant parties.

Thirdly, a key area that would both benefit from and contribute to improved labour market information is employment services. There is a considerable room for public employment services and private employment agencies to help advance understanding of the labour market, particularly in terms of labour demand and skills mismatches. The effectiveness of these institutions could also be enhanced, not just through improved labour market information and therefore better targeting, but also through increased resource allocation and capacity building.

Finally, in terms of aligning labour market governance with the actual characteristics of labour migration in Sudan, there are two glaring areas in need of address. The first is the fact that the main types of migrant workers in Sudan are seasonal agricultural workers and casual labourers. However, both these groups are omitted from the Labour Code, 1997. This presents a substantial loophole to both effective labour migration governance and also labour market governance. The second is that despite the clear legislation and rules on labour market governance at the federal level, there are substantial disparities between federal-level and state-level legislation and regulation. This again facilitates discrepancies that make it difficult to manage migrant workers in a wider labour market context.

Chapter 7

Conclusions and recommendations

This report has presented a labour market study with a focus on migrant workers. On the basis of the findings of this report, key recommendations are proposed at the strategy, policy and intervention levels. Each level of recommendation is broken down according to the responsibility of different social partners, namely Government, employers' groups and workers' groups, as well as other key stakeholders.

Strategic recommendation 1: Mainstream the promotion of productive and decent work for all (including migrant workers) throughout Sudan's development agenda.

This report shows that Sudan's labour market is underutilized, both in terms of overall labour force participation levels, especially with low labour force participation by women, and in terms of the quality of jobs. Analysis of key labour market indicators reveal major divides in the labour market in terms of age, gender and spatial divisions. It is estimated that a quarter of those employed in Sudan reside in households that, despite earning income from holding a job, live below the poverty line. Further, economic activity is largely supply-driven, characterized by low-productivity agriculture and services. Despite efforts by the Government of Sudan, particularly with support by international organizations to facilitate industrialization and structural transformation, education levels are too low and the skills base is too limited to achieve structural transition toward higher productivity through innovation and the application of new technologies.

Despite initiatives to bolster structural transformation, the lack of a guiding strategy on employment and job creation is noticeable. The mainstreaming of such a strategy to promote productive and decent work for all (including migrant workers) throughout Sudan's development agenda would help shape these initiatives towards improved outcomes; would help identify key stakeholders and institutional responsibilities, both within government and externally; and help bring focus on policies and interventions that maximize the creation of productive and decent work for all.

While there are reports to suggest a national employment policy is being developed, it appears that it is being developed without a sufficient evidence base and without sufficient institutional involvement. This assumption is made on the basis of the widespread lack of labour market information in Sudan and recent findings of the ILO (2020a) that highlights the lack of institutional consultation, including with social partners, as part of the development of this policy. Mainstreaming the promotion of productive and decent work for all (including migrant workers) through Sudan's development agenda is the first of the strategic recommendations.

Recommended action	Anticipated benefit	Relevant bodies
POLICY: Support the National Steering Committee for the revision of the national employment policy, ensuring that the policy is revised in collaboration with social partners and all relevant government departments, including those responsible for education, skills development, migration and economic policies, and in alignment with a labour migration policy.	Inputs from all social partners and external stakeholders (particularly those working with migrants, such as the ILO and UNHCR) are necessary to ensure that government investments towards employment and job creation are targeted to the economic areas with the greatest potential return in job creation and employment, from the perspective of employers and workers, and to maximize the benefits of migrant workers to the labour market.	Government, social partners and relevant stakeholders

Recommended action	Anticipated benefit	Relevant bodies
POLICY: Finalize Sudan's migration policy.	To govern, protect and promote equality of opportunities and treatment of migrants.	Ministry of Labour and Social Development (MOLSD), social partners and relevant stakeholders
INTERVENTION: Build the capacity of the members of the National Steering Committee.	Gain knowledge on how to design and implement an employment policy.	Government, social partners and relevant stakeholders
INTERVENTION: Improve and strengthen Sudan's labour administration system (labour inspection, dispute resolution, occupational health and safety), including ratification and compliance with the ILO Labour Administration Convention, 1978 (No. 150).	"Labour administration" is defined as all public administration activities in the field of national labour policies. It is an essential tool at the disposal of governments in fulfilling its responsibilities towards social and economic policies in the world of work.	MOLSD, social partners

Strategic recommendation 2: Enhance the capacity of the Government to produce statistics and improve the coordination of labour market information and analysis.

The findings of this report highlight the widespread lack of labour market information in Sudan and the lack of any coordination and systematic analysis. As mentioned above, the forthcoming national employment policy and any employment and job promotion policies have not been based on a sufficiently comprehensive base of up-to-date and regular labour market information. Moreover, while data are collected by different institutions, there is a lack of coordination and sharing of data and information.

Further, this report also highlights the shortage of information on migrant workers, thereby undermining the effectiveness of labour market governance with respect to migrant workers and labour migration governance. Improvements in this regard hold the potential to drastically improve the effectiveness of both labour market governance and labour migration governance, particularly if there is better coordination of data already being captured but not necessarily widely shared among various relevant parties.

Recommended action	Anticipated benefit	Relevant bodies
POLICY: Update the National Strategy for the Development of Statistics 2012–2016 to support a results-based development agenda and good governance for all stakeholders, users and producers.	The Central Bureau of Statistics (CBS) of Sudan, with the support of the UNDP (with additional inputs by one or two development partners) coordinated the design process of National Strategy for the Development of Statistics (2012–2016), which was launched in 2011 and approved by the Council of Ministers in 2013. Sector and state strategies are component building blocks for the National Strategy.	Government in a tripartite-plus setting
POLICY: Design a labour statistics framework that produces subnational estimates for key labour market indicators and captures information on migrant worker flows and characteristics.	Such information is necessary for evidence-based policymaking that responds to the needs of the labour market. A technical working group on labour market information can assist with this endeavour.	Government (CBS and MOLSD)
POLICY: Establish a technical committee to update the National Strategy for the Development of Statistics 2012–2016 in collaboration with the Central Bureau of Statistics (CBS).	There are a range of stakeholders for whom collection, analysis and dissemination of labour market information (including both labour supply and labour demand data) are relevant. Each stakeholder will have different priorities and areas of interest. A technical working group can help guide the improvement of labour market information to account for the various interests while assigning responsibilities.	Government (MOLSD and CBS)
INTERVENTION: Secure funds and support the implementation of the 2012–2016 National Strategy for the Development of Labour Statistics designed by the Ministry of Labour and Social Development (MOLSD).	The implementation of the 2012–2016 National Strategy for the Development of Labour Statistics is a necessary step to build a sustainable national integrated information system for Sudan that will support a results-based development agenda and promote democracy and good governance.	MOLSD and CBS
INTERVENTION: Implement and fund a labour force survey on a more regular basis, including expanded module on labour migration.	A necessary step as part of establishing improved labour market information for evidence-based policymaking.	CBS and MOLSD

Recommended action	Anticipated benefit	Relevant bodies
INTERVENTION: Implement and/or facilitate the implementation of regular establishment surveys.	Necessary to help gauge labour market demand.	CBS, MOLSD and employers' groups
INTERVENTION: Update and activate Sudan's Data Dissemination System (SDDS), and update existing portals such as http://sudan.opendataforafrica.org.	A data dissemination system (DDS) is the ultimate objective of data producers to address statistical needs and also to facilitate the development of statistical systems through the dissemination of information on the statistical practices and development plans of participants. Appropriate methods must be used (such as, workshops and seminars, annual reports, monthly bulletins, mass media CDs, and web dissemination). A DDS is also crucial for studying labour migration and labour markets.	Ministries, CBS, National Information Centre, social partners
INTERVENTION: Update and activate the Ministry of Labour and Social Development's website.	The MOLSD website contains the services provided by the Ministry and the requirements for these services, and also hosts labour acts and regulations, which enable nationals and migrants to know their rights.	MOLSD, National Information Centre
INTERVENTION: Promote and find partners to conduct a rapid computer-assisted telephone interviewing (CATI) labour force survey to identify key labour market impacts of Covid-19.	To provide key labour market indicators on the effects of Covid-19 in order to update the current situation of employment.	MOLSD, CBS

Strategic recommendation 3: Enhance the capacity and coordination of employment services within a wider national employment and jobs strategy.

Employment services play an integral role in the functionality of the labour market and are also an important source of information, particularly around labour demand. In Sudan, while the Labour Offices (public employment services) provide a number of key services, both to nationals and migrant workers, there are measures that can help make better use of employment services, in terms of their effectiveness and the information they capture, for the benefit of workers, jobseekers, employers and the Government. Enhance the capacity and coordination of employment services within a wider national employment and jobs strategy is the third of the strategic recommendations.

Recommended action	Anticipated benefit	Relevant bodies
POLICY: Ratify and enforce compliance with the Employment Services Convention, 1948 (No. 88) and the Private Employment Agencies Convention, 1997 (No. 181).	To help align rights and policies for employment agencies with international best practice and ILO Recommendations. Social partners have a responsibility to draw on international best practice, and sectoral priority areas should be highlighted through dialogue to ensure inclusion and reflection in labour market governance as well as to ensure that policies are perceived by all social partners as efficient, equitable and fair, including for migrant workers.	Government and social partners
POLICY: Establish memoranda of understanding between workers' groups and public and private employment agencies on the sharing of labour market information and the sharing of information on workers' rights, including migrant workers' rights.	To facilitate knowledge sharing and to ensure that migrant workers and potential migrant workers are fully informed of their rights and obligations as they start new work and look for work.	All social partners, led by Government
POLICY: Improve coordination between the state and federal levels on employment services, with clear institutional roles.	To encourage the coordination of employment services' and private employment agencies' objectives and information sharing with employment, migration and labour migration policymakers, including as part of the national employment policy and any other strategies around employment and jobs promotion.	All social partners, led by Government
INTERVENTION: Provide sufficient resources to allow for capacity building of public employment staff for improved access to employment services.	To ensure and allow for capacity building of staff for improved access to employment services.	Government
INTERVENTION: Actively promote the use of public employment services, through the encouragement of employers to advertise and seek candidates through these services.	Greater promotion of public employment services would allow for more confidence and understanding of the services available, and would allow for improved job matching if companies advertise through the services more and jobseekers are encouraged to use the services.	Workers' and employers' groups

Recommended action	Anticipated benefit	Relevant bodies
INTERVENTION: Expand the official employment services institutions and define their competencies precisely (registration, nomination, job matching, selection and employment).	To prevent conflict and duplication, and to subject employment services to the principles of transparency and accountability.	State governments, MOLSD, social partners

Strategic recommendation 4: Adjust and redesign labour market governance mechanisms to better incorporate migrant workers.

An important message that emerges from the report is that migrant workers cannot only be looked at from the migration perspective. They contribute to the labour force and their needs and challenges have to be addressed as part of labour, employment and skills development policies that foster the utilization of their potential for inclusive and sustainable economic growth.

The final strategic recommendation is associated with migrant workers and the implications for labour market governance. There are three main findings from the report in this regard. Firstly, that seasonal agricultural workers are the main type of migrant worker in Sudan, yet the Labour Code explicitly does not cover agricultural workers (among other select occupations and types of work). It is unclear whether there is any state-level legislation that instead covers seasonal agricultural migrant workers. Secondly, that there are discrepancies between federal- and state-level legislation towards migrant workers, particularly from a labour migration and migration policy perspective. This creates grey areas concerning regular labour migration (that is, with regard to both permission to enter and permission to work) and migrant workers' ability to know their rights. Finally, the last substantial finding is the lack of data and information on migrant workers. However, this is covered in strategic recommendation 2 above on labour market information. Therefore, the fourth strategic recommendation is to adjust and redesign labour market governance mechanisms to better incorporate migrant workers.

Recommended action	Anticipated benefit	Relevant bodies
POLICY: Address existing gaps in labour market governance (that is, in the Labour Code, 1997) where migrant workers are most prevalent, including seasonal agricultural workers, casual labourers and domestic workers.	To allow for more rights for migrant workers, including around the strictness of work permits, and for more explicit provisions for equal treatment of migrant workers. Labour market governance components on migrant workers need to be developed in a tripartite-plus setting, with inputs from other relevant stakeholders, including the UNHCR and IOM.	Social partners and other stakeholders

Recommended action	Anticipated benefit	Relevant bodies
POLICY: Ratify and comply with the: ▶ ILO Migration for Employment Convention (Revised), 1949 (No. 97); ▶ Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143); ▶ Labour Inspection (Agriculture) Convention, 1969 (No. 129); and ▶ Domestic Workers Convention, 2011 (No. 189).	To help align rights and policies for employment agencies with international best practice and ILO Recommendations. Social partners have a responsibility to draw on international best practice, and sectoral priority areas should be highlighted through dialogue to ensure inclusion and reflection in labour market governance as well as to ensure that policies are perceived by all social partners as efficient, equitable and fair, including for migrant workers.	Government and social partners
POLICY: Improve coordination between federal- and state level legislation, particularly around migrant workers from a labour market perspective.	For greater clarity and awareness of migrant workers' rights and consistency around enforcement of regulations.	Government and social partners
INTERVENTION: Ensure compliance with labour market governance, including guaranteeing that relevant actors have sufficient resources and capacity to ensure compliance with legislation and regulations, including to encourage and assist refugees to obtain work permits.	Ensure compliance with labour market governance around migrant workers, including enhancing capacity for labour inspections of migrant worker workplaces, and ensuring that relevant actors have sufficient resources and capacity to ensure compliance with legislation and regulation.	Social partners and other stakeholders

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Appendix I. List of key informants

No.	Position and/or organization	Location
1	Ministry of Labour, Public Service and Human Resource Development	Juba
2	South Sudan Legislative Assembly	Juba
3	Labour Office, Central Equatoria State	Juba
4	Migration Office	Juba
5	Office – Chamber of Commerce	Juba
6	Member – Chamber of Commerce	Juba
7	Secretary General, Central Equatoria State	Juba
8	Rapid and Response Fund Officer – IOM	Juba
9	Monitoring Officer – IOM	Juba
10	IOM Migration Management Unit	Juba
11	Paramount chief	Juba
12	Religious leader	Juba
13	Business owner	Juba
14	Business owner	Juba
15	Teachers training union	Juba
16	Workers' Trade Union	Juba
17	Directorate of Migration and Passport, Wau State	Wau
18	Wau Municipality Communications Department	Wau
19	Wau Chamber of Commerce	Wau
20	Community leader	Wau
21	Community leader	Wau
22	Staff – IOM	Wau
23	Norwegian Refugee Council	Wau
24	Employers' association	Wau
25	Youth union	Wau
26	Association of traders	Wau
27	Business owner	Wau
28	Business owner	Wau
29	Paramount chief	Yei
30	Ministry of Labour, Yei River State	Yei

31	Governor	Yei
32	Immigration Department, Yei River State	Yei
33	Community leader/chief	Yei
34	Community leader/youth	Yei
35	Religious leader	Yei
36	Yei County Women's Union	Yei
37	Yei Agricultural Producers Union	Yei
38	ACROSS	Yei
39	Business owner	Yei
40	Business owner	Yei

Appendix II. Quantitative interview questionnaire

The following questionnaire is consistent with the 19th ICLS resolution on statistics of work, employment and labour underutilization and the 20th ICLS statistical guideline on labour migration. It seeks to capture the nature of labour migration between IGAD countries, and collects information on the characteristics of migrant workers and their labour force status.

Module 1 - Socio-economic characteristics of labour migrants

OBJECTIVES AND SCOPE Covers basic demographics on sex, age, marital status, education level, field of study and current educational attainment of migrant workers
IMPLEMENTATION NOTES The module should be asked to pre-selected migrant workers regardless of labour force status. The module should be asked to migrant workers 15 years old and over.
A01 Full Name
A02 Marital Status 1=Single 2=Married 3=Divorced 4=Widowed
A03 Sex 1 Male 2 Female
A04 How old are you currently? (Record age in completed years or estimated years)
A05 What is your highest level of educational attainment (finalized education level) 1=No formal education 2= Primary education 3=Lower secondary education (O-level) 4= Upper secondary education (A- level) 5= Post-secondary (TVET and TVET college) 6= Tertiary education (University) 7= Other (Specify)
A06 Did you study in a public institution? Yes/No
A07 Did you learn any specialized trade or profession? Yes/No
A08 What type of trade or profession did you learn? Specify (e.g. Driver, electrician, doctors, teacher) ..... ISCO CODE

Module 2 - Labour force status

OBJECTIVES AND SCOPE Determines the labour force status of migrants according to the 19th ICLS standards on work, employment and underutilization
IMPLEMENTATION NOTES The module should be asked to pre-selected labour migrants regardless of labour force status. The module should be asked to labour migrants 15 years old and over.
B01. During the reference week, did you do any work for wage, salary, commission, tips or any other pay, even if only for one hour? 1=Yes >> B10 2=No
B02. During the reference week, did you run or do any kind of business, farming or other activity to generate income, even if only for one hour? 1=Yes>>>B04 2=No
B03. During the reference week, did you work without pay in a business owned by a household member, even if only for one hour? 1=Yes 2=No>>>B06
B04. Was this work in agriculture or fishing? 1=Yes 2=No >>B10
B05. In general, are the products obtained from this activity for sale or for family use? 1=Only for sale >>>>>>>>>>>>>>>>>>>>>>>>>>> B10 2=Mainly for sale >>> >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>B10 3=Mainly for family use 4=Only for family use
B06. During the reference week, did you have a paid job or a business from which you were temporarily absent and for which you expect to return? 1=Yes 2=No >>> B17
B07. What was the main reason you were absent from work during the reference week? 1=Sick leave due to own illness or injury >>>>>>>>>>>>B10 2=Public holidays, vacation or annual leave >>>>>>>>>>>>B10 3=Maternity or paternity leave as specified by legislation >>>>>>>>>>>>B10 4=Parental leave 5=Educational leave 6=Care for others and other personal absences 7=Seasonal work >>>>>>>>>>>>B17 8=Strikes or lockouts 9=Reduction in economic activity (e.g. temporary lay-off, slack work) 10=Disorganization or suspension of work (e.g. due to bad weather, mechanical, electrical or communication breakdown, problems with information and communication technology, shortage of raw materials or fuels) 11=Other, specify ______

B08. When will you return to work (same job/activity)? Include the time that you have been absent up to now.
1=Within 3 months or less >>B10
2= After 3 months
3= Not sure to return to work (Interviewer not to read)

B09. Do you continue receiving an income from your job during your absence?
Yes >>B10
No >> B17

B10. Did you have any business or performed any secondary activity for at least one hour during the reference week?
Yes
No

B11. How many hours do you usually work per week?
1=Main job _____ hours
2=Secondary job(s) _____ hours

B12. During the reference week, how many hours did you actually work?

	M	T	W	T	F	S	S	Total
1. Main job								
2. Secondary job(s)								

B13. INTERVIEWER. How many hours did the person work during the reference week at all jobs combined?
1=Less than 35 hours
2= 35 hours or more

B14. During the last 4 weeks, did you look for additional or other work?
1=Yes
2=No

B15. Would you want to work more hours per week than actually worked, provided the extra hours are paid?
1=Yes
2=No >> Module 3

B16. If an opportunity for additional work became available, could you start working more hours within the next two weeks?

1=Yes >>> Module 3
2=No >>> Module 3

B17. During the last 4 weeks, did you look for any kind of paid job or try to start any kind of business?

1=Yes >> B19
2=No

B18. Have you already found a job or arranged to start a business in the future?

1=Yes >>> B23
2=No >>> >>>B21

B19. What did you do in the last 4 weeks to find a job or start a business? [Mark all that apply]
1=Arranging for financial resources, applying for permits, licenses
2=Looking for land, premises, machinery, supplies, farming inputs
3=Seeking the assistance of friends, relatives or other types of intermediaries
4=Registering with or contacting public or private employment services
5=Applying to employers directly, checking at worksites, farms, factory gates, markets or other assembly places
6=Placing or answering newspaper or online job advertisements
7=Placing or updating resumes on professional or social networking sites online
8=Other, specify ______
9=No method >>> >>>B23

B20. For how long have you been without work and trying to find a paid job or start a business?
1=Less than 1 month
2=1 month to less than 3 months
3=3 months to less than 6 months
4=6 months to less than 12 months
5= years or more

B21. Would you want to work if a job or business opportunity became available?
1=Yes
2=No

B22. What is the main reason you did not try to find a paid job or start a business in the last 4 weeks?

1=Own illness
2=Disability
3=Studies
4=Pregnancy
5=Presence of small children
6=Refusal by family
7=Past failure to find suitable job
8=Lack of experience, qualification or jobs matching skills
9=Lack of jobs in the area
10=Considered too young or too old by prospective employers
11=Lack of infrastructure (assets, roads, transportation, employment services)
12=Other sources of income (pension, rent)
13= Estrangement
14=Other, specify _______

B23. If a job or business opportunity were available, could you have started work during the reference week or within the next two weeks?
1=Yes
2=No

B24. What is the mean reason why you are not available to start working in the next two weeks?
1=In studies, training
2=Maternity leave, child care
3=Injury, illness
4=Family member(s) consider that you should stay at home
5=Other, specify ______

Module 3 - Characteristics of employed labour migrants

OBJECTIVE AND SCOPE To capture the nature of employment of labour migrants Captures the sector of employment, status of employment, occupation, informal employment and informal/formal sector employment.
IMPLEMENTATION NOTES Aligned with the latest 19th ICLS guidelines concerning employment Should be asked to all labour migrants 15 years old and older that could be identified as employed in Module 2.
C01. What is the name of your place of work? 1= Domestic worker in private household 2= Without name 3= Name: .....
C02. What are the main goods or services produced at your place of work or its main function? Examples: selling fish, teaching children to read and write, caring for the sick, livestock farming *ISIC CODE*
C03a In the main job / business that you had last week, what kind of work do you usually do? Examples: policeman, primary school teacher, registered nurse, domestic worker, truck driver)
C03b What are your main tasks and duties? ISCO *ISIC CODE*
C04. In this job, are you: Working for someone for pay 1=Employee 2=Paid apprentice/Intern Working as an 3=Employer (with regular employees) >>>>>>>>>>>>>>>>>>>>>>>>>> C10 4=Own account worker (without regular employees) >>>>>>>>>>>>>>>>>>>>>>>>> C10 5=Helping without pay in household/family business >>>>>>>>>>>>>>>>>>>>>>>>> C10 6=Other (please specify) >>>>>>>>>>>>>>>>>>>>>>>>>> C10
C05. Have you been employed on the basis of: 1=Written contract 2=Oral agreement
C06. Is your contract or agreement a: 1= Permanent arrangement 2= Temporary arrangement
C07. Does your employer pay contributions for social security on his/her behalf (e.g. pension fund, etc.)? 1=Yes 2=No 3= Do not know
C08. Do you benefit from paid annual leave or /payment compensation for leave not taken? 1=Yes 2=No 3= Do not know

C09. Do you benefit from paid sick leave in case of illness or injury? 1=Yes 2=No 3= Do not know
C10. Was your main activity carried out in...? (READ) 1= Government (federal, state, local) 2= State owned enterprise 3=Private business or farm 4= International org., foreign embassy 5=Others
C11. Is the enterprise/business where you work? (READ) 1= An incorporated company 2= An independent, personal family business 3= Do not know
C12. Is the enterprise/business where you worked registered with (relevant authority)? 1=Yes 2=In the process of being registered 3=No 4=Do not know
C13. Does the business keep a book of accounts (assets and expenditures)? 1=Yes 2=No 3= Do not know
C14. How many persons, including the owner, work at your place of work? 1= 1 persons 2= 1-4 persons 3= 5-9 persons 4= 10-19 persons 5= 20-49 persons 6= 50+
C15. In what type of place do you usually work? 1=At home 2=Structure attached to the home 3= At the client/employer's home 4= At an office, shop factory, or other fixed place of work 5= Fixed stall in market/mobile 6= Land, forest, sea, ... 7=Without fixed location/mobile 8= Construction site 9= Other (specify)
C16. How long have you worked for this employer/in this business? 1= Less than 6 months 2= 6 months to less than 1 year 3= 1 year to less than 3 years 4= 3 years to less than 5 years 5= 5 years or more
C17. What is the net daily/weekly/monthly earnings of (NAME) from his/her business or activity? (Please round up and specify currency unit) C16a=Daily C16b= Weekly C16c= Monthly

Module 4– Nature of labour migration

OBJECTIVE AND SCOPE
To capture international migration status
Captures basic essential characteristics needed to identify the foreign-born and foreign populations in the country of destination. This includes: country of birth, date of last arrival to country of current residence, reason for move, and country of citizenship.
It allows distinction between recent and long-term international migrants.
The module covers also transit migration, short-term -, circular, and irregular migration.
The module does not cover internal migration and returnees.

IMPLEMENTATION NOTES
Aligned with the latest 20th ICLS guidelines concerning international labour migration
Aligned with the recommendations included in the Handbook on Measuring International Migration through Population Censuses (UN 2017).
The module should be asked to labour migrants 15 years old and over.

D01 In which country were you born? (please specify)

NAME OF COUNTRY *CODE OF COUNTRY*

D02 What is the country of your citizenship/nationality (please specify)? If you have dual citizenship please name both countries
D02a=Country 1.....
D02b=country 2.....

D03 What is your current resident status in this country?

1=Non-usual resident[20] (short-term business) (e.g. frontier workers, seasonal workers, other short-term migrant workers, volunteer workers and nomads)
a=Yes b=No
2=Usual residents[21] but have no official documentation of residence a=Yes b=No
3=Usual resident a=Yes b=No

D04 In what month and year did you [did NAME] leave your country of birth?

Interviewer: Use 2 digits for the month and 4 digits for the year; Record 00 if the month is unknown

D04a= Month: MM
D04b=Year: YYYY

D05 In which month and year did (you/NAME) most recently arrive to live in [COUNTRY]?
_____ _____

MONTH YEAR

97=DONT KNOW 9997=DON'T KNOW

20 Less than 6-monhts

21 More than 6-months

D06 How long have you been living in this [COUNTRY]...? 1=Three months or less 2=Three to 12 months 3=One year to less than 5 years 4=Five years to less than 10 years 5=Ten years or more
D07 What was the main reason for you to leave your home country? 1= In search for an opportunity to make money 2= In search of establishing a business 3= Promised a job 4= To take up a new job 5= Job transfer 6= Study/Training 7= Marriage 8= Family moved/ to live with a relative/dependent 9= Health reasons 10= Natural disaster/ environment 11= Conflict 12= Others (specify)
D08 Have you ever lived in another country than this one continuously for 3 months or more? 1 = Yes, in another country 2= No, except my birth place >>>>>>>>>>>>>>>>>>D12 3= No >>>>>>>>>>>>>>>>>>D12
D09 In which country did you live before moving here?
D10 What was the main reason for you to move here? 1= In search of job for pay 2= In search of establishing a business 3= Promised a job 4= To take up a new job 5= Job transfer 6= Study/Training 7= Marriage 8= Family moved/ to live with a relative/ dependent 9= Health reasons 10= Natural disaster/ environment 11= Conflict 12= Others (specify)
D11 Have you ever travelled outside of this country even if only for a short period? 1= Yes 2= No
D12 In the past 12 months, how many times did you travel abroad? 1= Every day 2= Every week 3= Few times a month 4= Once every month 5= Few times a year 6= Only travelled once/ once a year

D13 When travelling abroad, how long do you usually stay there? 1= One week or less 2= More than 1 week but less than 1 month 3= 1 month to less than 3 months 4= 3 months to less than 6 months 5= 6 months to less than 12 months 6= 12 months or more
D14 What is the usual reason for your frequent travel? 1= Job search 2= For business 3= To visit family and friends 4= Other
D14 Did you [did NAME] pay any fees to a recruitment agency, employment service, employer, relatives, friends, or any other person in your country to obtain a job here in this country? 1=No >>>>>>>>>>>>>>>>>>D18 2= Yes
D15 To whom did you [did NAME] pay any fees? 1= Recruitment agency (private agency) 2= Employment service (public agency) 3= Employer 4= Relatives or friends 5= Other (specify)
D16 How much did you [did NAME] pay? (Please round up and specify currency unit)
D17 From where did you [did NAME] get the money to pay for the fee? 1= Personal savings 2= Loan from family/ relatives 3= Loan from government agency 4= Loan from charity institutions/ NGOs 5= Contracted a personal loan 6= Loan by a recruitment agency 7= Other (Specify)
D18 Did you [has NAME] send any money or goods from here to your home country during the last month? 1= Yes, cash only 2= Yes, goods only 3= Yes, both cash and goods 4= No >>>>>>>>>>>>>>>>>>>>>>>> End interview
D19 What is the total value of any money or equivalent value of goods you sent to your home country during the last month? (Please round up and specify currency unit)

▶ Appendix III. Key informant semi-structured interview template

The following key informant interview guide was provided to field researchers conducting interviews with government officials, non-governmental organizations and relevant stakeholders from international organizations (such as the IOM) and others, for capturing information specifically around the legal framework for labour migration, perspectives towards migrant labour rights from a policy perspective, and other information.

INFORMATION TO BE CAPTURED ▶ **Perspectives on labour migration trends** ▶ **Legal framework and structural arrangements** ▶ **Perspectives on labour migration management** ▶ **Perspectives around rights of migrant workers**
A01 Full Name and position in organization
A02 Please briefly outline the characteristics and trends of labour migration as well as the positive and negative impacts of labour migration in your country. Is your country a country of destination, origin or both?
A03 What is the most common type of labour migration in your country (in and outbound). For example, circular migration, seasonal migration, long-term, qualified workers or low skilled workers migration? [field researcher to explain the difference as needed]
A04 What do you think are the main driving forces of labour migration? (past, present and future)
A05 Does your country have bilateral or regional labour migration agreements/schemes? Please briefly outline its content and purpose.
A06 What are the priorities of the national policy concerning labour migration in your country?
A07 What is the main legal framework for labour migration management (governance) in your country. If possible, please also present the background to the existing legislation in terms of labour needs, employment/job creation, and political/historical linkages to other countries
A08 Are migrant workers and the general population treated any differently in your country?
A09 Do you think it is necessary to have provisions or a system in place to allow migrant workers to have equivalent or equal treatment to workers from the general population? If so, how would you ensure equal treatment of migrant workers?
A10 Are there international agreements (or other forms of cooperation) on rights of labour migrants has your country concluded with other IGAD countries?
A11 What are the roles of the national employment services (or equivalent bodies) and private recruitment agencies (if existent) in the process of migrant employment?
A12 What are the challenges in your current local content laws that would require adjustments to promote labour mobility?
END OF INTERVIEW:

Appendix IV. Glossary of terms

Bilateral labour agreements refer to agreements between two entities which create legally binding rights and obligations governed by international law and are usually more specific and action-oriented, non-binding memoranda of understanding which set out a broad framework of cooperation to address common concerns, as well as other arrangements, including between specific government ministries or agencies in destination and origin countries. [22]

Domestic worker refers to a person engaged in domestic work within an employment relationship. A person who performs domestic work only occasionally or sporadically and not on an occupational basis is not a domestic worker. [23]

Employment by education refers to those in employment by level of educational attainment, which is classified according to International Standard Classification of Education (ISCED) levels, namely: less than primary education (ISCED level 0); primary education (ISCED level 1); secondary education (ISCED levels 2 and 3); and tertiary education (ISCED levels 5 to 8). [24]

Employment by occupation refers to employed persons classified according to the International Standard Classification of Occupations (ISCO).

Employment by sector refers to employed persons classified according to the International Standard Industry Classification (ISIC), Revision 3.

Employment by skill level refers to employed persons classified according to low (skill level 1), medium (skill level 2) and high (skill levels 3 and 4) skill levels that correspond to ISCO guidelines.

Employment in the informal economy refers to those employed in the informal sector and those in informal employment (that is, it also includes informal employment outside of the informal sector).

Employment in the informal sector (informal enterprises): According to the international standards adopted by the 15th ICLS, the informal sector consists of units engaged in the production of goods or services with the primary objective of generating employment and incomes to the persons concerned. The informal sector is a subset of unincorporated enterprises not constituted as separate legal entities independently of their owners. They are owned by individual household members or several members of the same or different households. Typically, they are operating at a low level of organization, on a small scale and with little or no division between labour and capital as factors of production. [25]

Forced labour refers to all work or service which is exacted from any person under the menace of any penalty and for which the said person has not offered himself voluntarily. [26]

Informal employment: The concept of informal employment refers to jobs as observation units. In the case of own-account workers and employers, the informal employment status of the job is determined by the informal sector nature of the enterprise. Thus, own-account workers (without hired workers) operating an informal enterprise are classified as in informal employment. Similarly, employers (with hired workers) operating an informal enterprise are classified as in informal employment. All contributing family workers are classified as having informal employment, irrespective of whether they work in formal or informal sector enterprises. [27]

22 ILO, Addressing Governance Challenges in a Changing Labour Migration Landscape, ILC.106/IV (2017), para. 68.

23 ILO Domestic Workers Convention, 2011 (No. 189), Article 1(b–c).

24 UNESCO Institute for Statistics, International Classification of Education 2011, 2012.

25 ILO, Women and Men in the Informal Economy: A Statistical Picture, 2018, box 2.

26 ILO Forced Labour Convention, 1930 (No. 29), Article 2(1).

27 ILO, Women and Men in the Informal Economy: A Statistical Picture, 2018, box 2.

Irregular migrant worker refers to a migrant worker considered to be in an irregular situation or non-documented situation if they are unauthorized to enter, to stay and to engage in a remunerated activity in the State of employment pursuant to the law of that State and to international agreement to which that State is a party. [28]

Labour force refers to the current supply of labour for the production of goods and services in exchange for pay or profit.

Labour mobility refers to temporary or short-term movements of persons for employment-related purposes, particularly in the context of the free movement of workers in regional economic communities. [29]

Labour underutilization refers to mismatches between labour supply and demand, which translate into an unmet need for employment among the population. Measures of labour underutilization include, but may not be restricted to, time-related unemployment, unemployment and the potential labour force.

Less than primary education: Less than primary education (ISCED-A level 0) refers to a broad level of educational attainment covering no participation in education, some participation in early childhood education and/or some participation in primary education.

Migrant worker or international migrant worker refers to all persons of working age (in this case, those aged 15+) present in the country of measurement, who were during the specified reference period in one of the following two categories:

i. Usual residents: International migrants who were in the labour force of the country of their usual residence, either in employment or in unemployment; or

ii. Not usual residents (or "non-resident foreign workers"): Persons who, during a specified reference period, were not usual residents of the country but were present in the country and had labour attachment to the country, that is, were either in employment supplying labour to resident producer units of that country or were seeking employment in that country.

Given the primary data collection element of this study, the definition is in line with the 20th ICLS Guidelines Concerning Statistics for International Labour Migration.

Mixed migration lacks a standard definition however the principal characteristics of mixed migration flows include the multiplicity of factors driving such movements and the differentiated needs and motivations of the persons involved. Many migration streams include people who are on the move for different reasons but share the same routes or modes of travel. They may include refugees, asylum-seekers, forcibly displaced persons, smuggled persons, economic migrants, victims of human trafficking and stranded migrants. People may also move between these categories during the course of their migration. Increasing recognition of these complex migration dynamics has led to the rise of the notion of "mixed migration". [30]

Permanent migrant refers to a person who enters with the right of permanent residence or with a visa or permit which is indefinitely renewable. Permanent immigrants would generally include marriage immigrants, family members of permanent residents, refugees, certain labour migrants, etc. [31]

Persons in employment are defined as all those of working age who, during a short reference period, were engaged in any activity to produce goods or provide services for pay or profit.

Persons in time-related underemployment are defined as all persons in employment who, during a short reference period, wanted to work additional hours, whose working time in all jobs was less than a specified hours threshold, and who were available to work additional hours given an opportunity for more work.

Persons in unemployment are defined as all those of working age who were not in employment, carried out activities to seek employment during a specified recent period, and were currently available to take up employment given a job opportunity.

28 International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, Article 5.

29 ILO, Addressing Governance Challenges in a Changing Labour Migration Landscape, ILC.106/IV (2017), para. 6, footnote 8.

30 ILO, "Media-Friendly Glossary on Migration: Middle East Edition".

31 ILO, "Media-Friendly Glossary on Migration: Middle East Edition".

Persons outside the labour force are those of working age who were neither in employment nor in unemployment in the short reference period.

Potential labour force refers to persons not in employment who express an interest in this form of work but for whom existing conditions limit their active job search and/or their availability.

Primary education: Primary education (ISCED level 1) provides learning and educational activities typically designed to provide students with fundamental skills in reading, writing and mathematics (that is, literacy and numeracy) and establish a solid foundation for learning and understanding core areas of knowledge and personal development, preparing learners for lower secondary education. It focuses on learning at a basic level of complexity with little, if any, specialization.

Private employment agencies refer to any private individual or enterprise (that is, independent of the public authorities) which provides one or more of the following labour market services: (i) services for matching offers of and applications for employment; (ii) services consisting of employing workers with a view to making them available to a third party; or (iii) other services relating to jobseeking. [32]

Public employment services are usually the primary government institution responsible for implementing a variety of active labour market programmes including the provision of career guidance and labour exchange services. The basic mandate of Public Employment Services is to facilitate the adjustment of firms and workers to changing labour market conditions. [33]

Recruitment agencies are used for the purpose of this report synonymously with the term "labour recruiter", and refer to both public employment services and to private employment agencies and all other intermediaries or subagents that offer labour recruitment and placement services. Labour recruiters can take many forms, whether for profit or non-profit, or operating within or outside legal and regulatory frameworks. [34]

Refugee refers to someone who has been forced to flee his or her country because of persecution, war or violence. A refugee has a well-founded fear of persecution for reasons of race, religion, nationality, political opinion or membership in a particular social group. A person is an asylum-seeker until they are determined to be a refugee in accordance with national and international law. [35]

Seasonal worker refers to a migrant worker whose work by its character is dependent on seasonal conditions and is performed only during certain part of the year. [36]

Secondary education: Secondary education (ISCED levels 2 and 3) provides learning and educational activities building on primary education and preparing for labour market entry, post-secondary non-tertiary education, and tertiary education. Broadly speaking, secondary education aims at learning at an intermediate level of complexity. ISCED distinguishes between lower and upper secondary education.

Smuggling of migrants is defined as the procurement, in order to obtain, directly or indirectly, a financial or other material benefit, of the illegal entry of a person into a State Party of which the person is not a national or a permanent resident. [37]

Status in employment refers to employed persons classified according to the International Standard Classification of Employment (ISCE)-93 as either an employee, employer, own-account worker, contributing family worker or member of producer's cooperative or employee, depending on the characteristics of the job.

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32 Adapted from Private Employment Agencies Convention, 1997 (No. 181), Article 1.

33 ILO, "Public Employment Services".

34 ILO General Principles and Operational Guidelines for Fair Recruitment.

35 UN Convention Relating to the Status of Refugees, 1951; see also ILO, Background Paper and Draft ILO Guiding Principles for Discussion at the ILO Tripartite Technical Meeting on the Access of Refugees and Other Forcible Displaced Persons to the Labour Market, TMARLM/2016 (2016).

36 International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, Article 2(1)

37 Protocol against the Smuggling of Migrants by Land, Sea and Air, Supplementing the United Nations Convention Against Transnational Organised Crime, Article 3(a).

Temporary migrant refers to a person of foreign nationality who enters a country with a visa or who receives a permit which is either not renewable or only renewable on a limited basis. Temporary immigrants are seasonal workers, international students, service providers, persons on international exchange, etc. [38]

Tertiary education: Tertiary education (ISCED levels 5 to 8) builds on secondary education, providing learning activities in specialized fields of education. It aims at learning at a high level of complexity and specialization. Tertiary education includes what is commonly understood as academic education but also includes advanced vocational or professional education.

Trafficking in persons is defined as the recruitment, transportation, transfer, harbouring or receipt of persons, by means of the threat or use of force or other forms of coercion, of abduction, of fraud, of deception, of the abuse of power or of a position of vulnerability or of the giving or receiving of payments or benefits to achieve the consent of a person having control over another person, for the purpose of exploitation.[39]

38 OAS and OECD, International Migration in the Americas: Third Report of the Continuous Reporting System on International Migration in the Americas (SICREMI), 2015, 3; ILO, Addressing Governance Challenges in a Changing Labour Migration Landscape, ILC.106/IV (2017), para. 21

39 Protocol to Prevent, Suppress and Punish Trafficking in Persons Especially Women and Children, supplementing the United Nations Convention against Transnational Organised Crime, Article 3(a)

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