



An Emergency Market Mapping and Analysis study **Market Support in South Sudan**

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In recent years, international humanitarian agencies have been re-examining their responses to emergencies. Globally, most organisations now recognise the centrality of markets in sustaining people's lives and livelihoods. However, there has also been a subsequent realization that unless emergency responses (both cash and in-kind) are designed with a good understanding of key markets, they may inadvertently damage livelihoods, jobs and businesses, thus undermining recovery and prolong dependence on outside assistance. Also without that understanding, opportunities might be missed to lay the foundations for early recovery and development interventions through the creation of partnerships with the private sector.

In response to this need for better analysis of markets in emergencies, the Emergency Markets Mapping and Analysis (EMMA) tool was developed by the International Rescue Committee UK (IRC), Oxfam GB (OGB) and Practical Action, in consultation with many other international organisations. The EMMA toolkit was designed to be used in sudden onset crises and has the concept of rapid and realistic, 'good enough' analysis at its core. Using a combination of existing tools, from seasonal calendars to market systems maps, the EMMA combines gap analysis (people's uncovered needs) and market system analysis (market's core value chain, infrastructures and supporting services, and market's environment and rules) to offer a systemic and comprehensive understanding of the constraints and capacity of critical market systems. Based on this analysis, EMMA offers a series of response recommendations that detail how far the critical markets analysed can help deliver humanitarian assistance, which areas of the market may need additional support in this aid delivery and can further suggest ways in which interventions

may strengthen the market systems in the longer term.

This case study details the use and results of the EMMA in South Sudan that took place in June 2011, carried out by Mercy Corps and the Norwegian Refugee Council (NRC), and adds to the learning process for the development of the EMMA toolkit.

Background

Abyei is a relatively small and disputed area of land on the border of North and South Sudan that has, in recent years, experienced much turmoil. Historically, both the governments of South and North Sudan have claimed Abyei and tensions that have existed since before the first Sudanese Civil War (1956-1972), have periodically bubbled up to the surface.

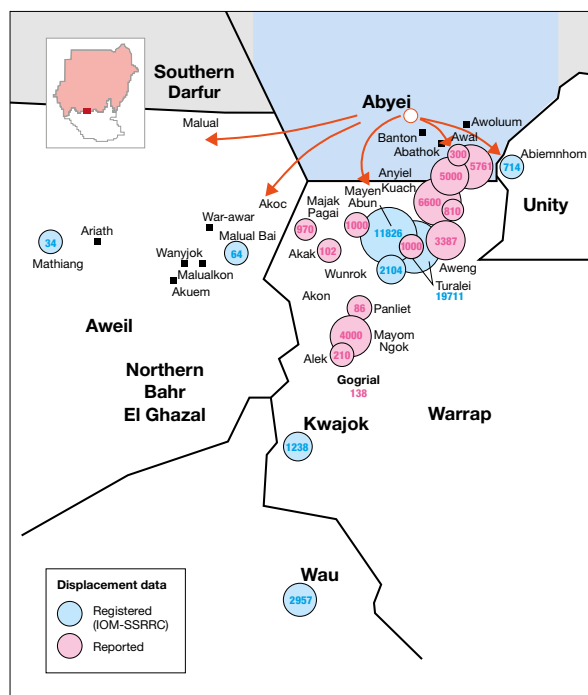
In anticipation of the July 2011 referendum on South Sudanese independence, tensions again began to mount. From October 2010, Southern Sudanese people began to return from their homes and jobs in the north.



IDP camp in Wau taken in late June. Original expectations were that more wealthy households had gone to Wau and were renting tukuls but when we went we found several IDP camps, this one had over 250 households. Photo: Michael Gillespie/Mercy Corps

As of early July 2011, the total number of returnees to South Sudan was 315,000, with many settling in Twic County, south of Abyei in neighbouring Warrap state. As a result, the inhabitants of Twic County were struggling to accommodate a large increase in the population, many of whom were extremely vulnerable.

In May 2011, following violent skirmishes, the Sudan Armed Forces (SAF) sent troops into Abyei seeking to push out the Southern forces. The resulting occupation of Abyei town and the land north of the river Kiir directly led to the large scale displacement of most of the population of Abyei town, and outlying areas, into Twic County and to Agok in southern Abyei. Within 48 hours there was a second displacement of people from Agok as fear spread of further SAF advances in the south. In conjunction, these two displacements meant that a large proportion of Abyei area residents had fled into Twic County in Warrap State. United Nations (UN) agenciesⁱ estimated the number of those displaced to be 113,000, spread throughout Warrap State, Northern Bahr el Ghazal and Wau.



Map of Displaced Populations from the Abyei Area

Compounding the pressure and instability caused by the numbers of both the returnees and the Internally Displaced Persons (IDPs), the North had blocked trade routes to the South – main supply routes for the South - in the midst of the traditional lean season. Livelihoods in North and South Sudan have traditionally been strongly linked and communities have become co-dependent on each other for trade, commodities, transhumance movement and the exchange of labour. The blockade of the roads meant that up to 3000 trucks were on the border, waiting to head south, bearing key food stuffs.

The combination of these factors had a significant impact on food security in both the short and medium term. In Wau, prices for Northern Sudanese goods were 35% above their five year averageⁱⁱ and prices for staple foods, such as sorghum, had increased by 40%ⁱⁱⁱ. Food prices in Abyei had also increased dramatically and a wide range of commodities had disappeared from the market as traders struggled to find alternative supply routes^{iv}.

Moreover, due to the displacements, the land, both North and South of the Kiir had not been cultivated during the primary planting season. IDPs returning home faced the loss of agricultural assets, including their seed stores and their tools for cultivation. Prior to the crisis, agriculture met about 40-50% of the local populations' food needs and provided approximately 19% of household income. With restricted supplies, increased prices of staple foods and uncultivated land, the hunger gap was predicted to continue into the 2012 planting season.

The international community sought to address the immediate needs of the crisis affected population of Abyei and beyond, through the distribution of essential food and non food items. However, in addition to the need to provide immediate relief, solutions needed to be found that addressed the loss of agricultural assets. Without this component, many households would have struggled to cultivate in the 2012 season, thereby failing to protect their food and income security.

In this context, Mercy Corps and the Norwegian Refugee Council (NRC) decided to conduct an EMMA to look specifically at the feasibility of market based interventions to assist with improving food security and access to shelter.

EMMA in the 2011 Abyei Crisis Response

This EMMA was conducted jointly by Mercy Corps and the NRC between the 20th and 28th of June 2011, approximately four weeks after the start of the crisis. Data was collected between the 23rd and 25th of June by four teams, including the core participants and forty enumerators, covering Wunroc, Turalei, Agok and Wau. Prior to the data collection, 12 Mercy Corps and 6 NRC staff received training in the first steps of the EMMA process, including the selection of critical markets, delivered by a Mercy Corps EMMA trained facilitator. There was then an additional two days of training after data collection in which results were shared and recommendations discussed.

Although this EMMA was organised in response to the Abyei crisis, it was clear from the start that the crisis would have had little or no impact on regional trading hubs such as Juba and Wau (some 630 kilometres and 215 kilometres away). Yet the closure of roads from the north was having a profound effect on markets across South Sudan. This closure, combined with

independence, had created a period of difficulty for many traders but had also opened up opportunities to seek new trade routes. Given this, the market surveys focused on analysing the impact of the road closures on market systems.

Why Use EMMA in South Sudan?

Mercy Corps and NRC were keen to use the EMMA and to try to find suitable market based responses to the Abyei crisis. Mercy Corps, in particular, had a great deal of organisational commitment to finding new responses to the displacements and the annual distributions of food and tools in South Sudan. While the NRC had undertaken a market assessment on the needs and availability of vocational training in Abyei, this was the first time that a commodity based markets assessment had been carried out in the area.

Moreover, the EMMA in South Sudan had a specificity that it looked at markets that could help rebuild livelihoods in the medium, rather than short- term and that it had, as a central aim, the building of staff knowledge and understanding about market based approaches in general and the use of the EMMA specifically. Mercy Corps and the NRC also sought to use the EMMA as a major advocacy tool for donors, highlighting the potential pitfalls of traditional in kind distributions and demonstrating how market based interventions can build the strength and resilience of livelihoods and market systems in the longer term.

Challenges for the Implementation of EMMA in South Sudan

The EMMA in South Sudan was challenging for a number of reasons:

- The movement of people had not yet stabilised making it difficult to identify both target groups and the most relevant market systems. The instability also resulted in the cancellation of one day of data collection in Turalei as the town was attacked and briefly occupied by militias. In the context of such instability, it was extremely difficult to accurately gauge people's needs.
- Markets had not fully stabilised from both the shock of the Abyei crisis and the ongoing road closures. At the time of the assessment, independence was just a few weeks away, the issue of road closures had not been resolved and it was unclear when they would reopen. Wau market traders were confident

that roads would reopen, and many of them would be unable to trade for much longer unless roads did reopen. This instability in the markets meant that the recommendations were dependent on subsequent events regarding the reopening of trade routes from the north.

- By focusing on training and capacity building the period for data collection was reduced, meaning that five days were used for training and three days for data collection.
- The team that was selected for training had a range of skills and capacity to take the EMMA methodology and concepts on board. The emphasis on broad participation of a large team had the effect of slowing the process down when compared with an EMMA that is conducted by a small and more focused group.

While the EMMA was conducted in a period of instability, there were reasons behind this choice. With the rainy season imminent and the goods in the market dwindling, the timeframe to conduct the market assessments prior to the onset of food shortages was somewhat limited.

The South Sudan EMMA had the specificity that it focused primarily on the medium and longer term (not immediate) interventions and objectives, when stability had, to some extent, returned. Moreover, the use of the EMMA for training and capacity building was seen as a vital component in this context, where market approaches were novel and untested. However, the fact that the EMMA was able to be used so flexibly and with such practical outcomes is, in many ways, a mark of its success.

The EMMA Process: target groups and critical markets

In previous clashes in Abyei, international agencies had noted that many fleeing residents would stay with relatives in Agok. However, the secondary displacement from Agok, meant that this option was no longer available, removing an essential coping mechanism for many people. As a result, many IDPs from Abyei had moved into Twic County and were sleeping without shelter or in overcrowded conditions. The start of the rainy season would mean that these difficult circumstances would become dire. As a result, the first target groups were those displaced households without shelter in Twic and Southern Abyei.

Twic County was particularly affected by the influx of refugees, which stretched already limited resources to crisis point. Host households that were interviewed reported an average of a 42% increase in expenditure due to higher market prices and increased demand from their enlarged household size.

International organisations had begun to see the return of Abyei residents to Agok. However, they had returned too late for the planting season, and therefore had a

significant risk of food shortages in the foreseeable future. To compound this strain, there was the potential that these recently returned people would, in turn, play host to IDPs from further north.

As a result, the second target group for the EMMA assessment was those host community households (primarily in Twic County) and displaced households with access to agricultural land (South Abyei and Twic County)

Based on an analysis of existing needs, the existence of regional markets for selected items and organisational strengths, Mercy Corps and NRC focused on three critical markets to be studied. These were: iron roofing sheets; metal sheets for malodas (traditional hoes) and okra seeds. These markets represented an item for use in the emergency response and two farm inputs that are critical in cultivation.

Costs

The EMMA cost \$8,670 and covered staff salaries (including the cost of an EMMA specialist), international and internal flights, accommodation, meals and the enumerator's wages.

EMMA Findings

With the proliferation of vulnerability and food insecurity in highly resource constrained IDP and host households, it was clear that immediate food needs would have to be addressed. As EMMA, in this context, did not seek to

address these immediate needs, the operational details of essential humanitarian food and non-food distribution will not feature here. The South Sudan EMMA sought to create and prepare for recovery responses based on appropriate market based responses for when people had returned to their homes and roads had reopened in the medium and long term.

Although the EMMA had many specific market systems findings, there were a number of general findings that typified the markets in the region.

- Despite the crisis, markets continued to play a major role in accessing food^v and continued to function on a limited scale and with hugely inflated prices.
- In both the maloda metal sheets and okra seeds market systems, Non Governmental Organisations (NGOs) were found to be key actors in the market chain, distorting both supply and demand and thereby preventing the sustainable development of each market.
- The closure of roads from Khartoum had a catastrophic effect on all markets as many traders had nothing left to trade.
- In the target region, including Wau, there were few market linkages with East Africa with the expense of transportation and insecurity on the roads cited as the most common reason for the reluctance to explore supply lines from the south.



Example of a hardware store in Kuajok which had basic agriculture inputs all of which are sourced from the north and none are produced locally. Photo: Mercy Corps



South Sudan has considerable agricultural potential, but a lack of infrastructure and ongoing insecurity has limited production. Photo: Alun McDonald

Access to key agricultural inputs through local markets

The EMMA assessment specifically looked at the market systems for okra seeds and for malodas, as they are commonly used and are important agricultural inputs. The assessment looked at these specific products and mapped the market system to establish what changes had occurred as a result of the Abyei displacement crisis and the closure of supply routes from the north.

The Maloda Market

The EMMA found that for both IDPs and host communities, maloda, or traditional hoes, were considered a basic need. Prior to the crisis, it was common that farmers would take scrap metal to the blacksmiths, who would then turn the metal into a maloda. As part of routine distributions, NGOs have regularly given one alternative East African hoe per household. These are generally disliked by farming households and are often taken for reshaping at local blacksmiths.

The use of household income to make or adapt this tool, not only indicates how important they are to local agriculture, but also that households do have purchasing power for this commodity. In the planting season, it is common that all household members have a maloda, to help in the planting of crops. Therefore, despite the regular NGO distributions, there was still a viable market for malodas in the target area.

Post crisis, the EMMA found that local production of maloda was inhibited by a decrease in availability of scrap metal and insufficient skills of practising blacksmiths. New metal sheets found in Wau were increasingly being used by the blacksmith cooperative there, suggesting that if these sheets could be brought to local markets, they could act as a new raw material for blacksmiths. While the supply lines for metal sheets from Khartoum were restricted by the closure of the roads, the emergence of new actors, such as China and Dubai, offered opportunities to create alternative supply lines.

Response Options for the Maloda Market

The EMMA report stated that, primarily, to enable the market to function better, NGOs should be removed as a market actor. As malodas are not the most effective tool for cultivation, the EMMA also found that any responses to strengthen the maloda market should include activities that address this. Longer term behavioural change could come about through sharing new and more effective agricultural practices.

Okra Seeds

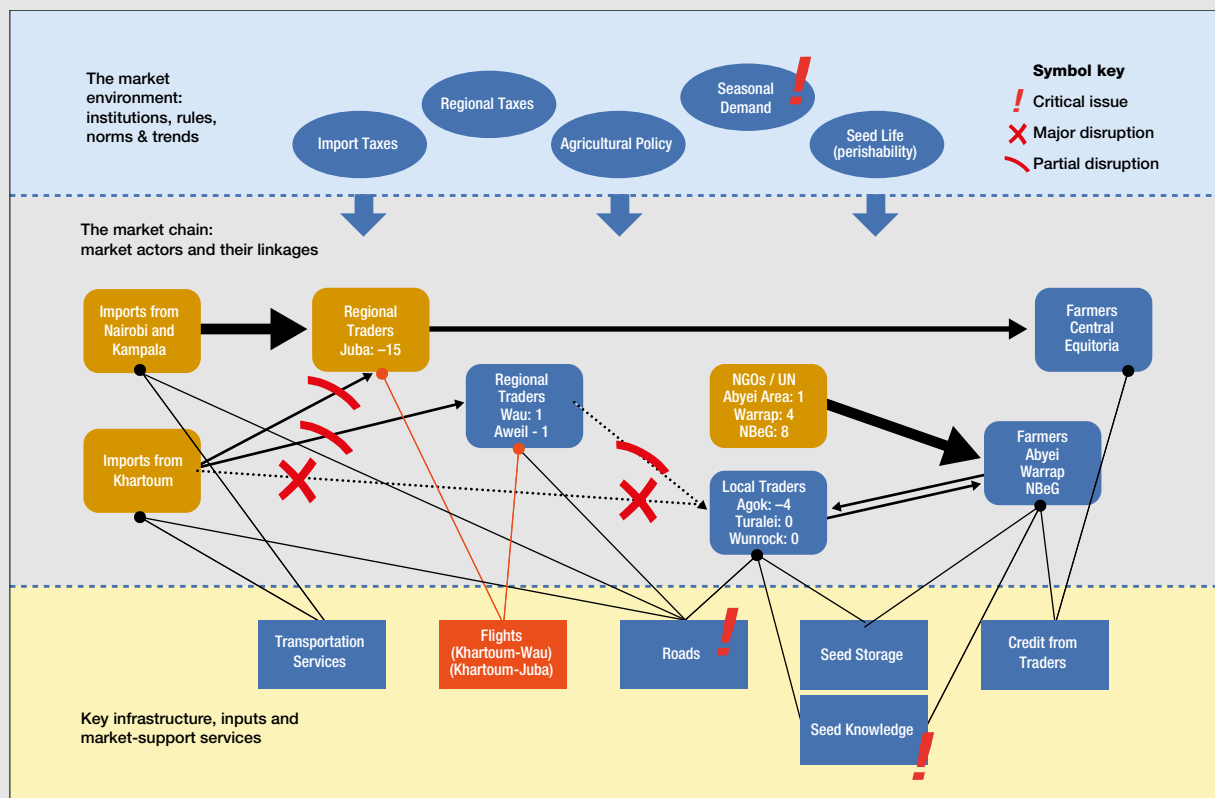
The okra seeds market system was selected for a number of reasons. Not only can okra be grown on a small scale (even in pots, which can allow those IDPs in camps to cultivate this crop), it can also be grown year round. Despite this flexibility, okra has traditionally been grown only during the main planting season. Okra is the most common vegetable to be grown in the target areas and has been the focus for many NGO distributions in the area due to its nutritional value. If market based approaches were to

be applied, it would be important to demonstrate to NGOs that there is a viable and sustainable market system for the target population.

Prior to the IDP and road closure crisis, okra seeds were supplied to South Sudan either from Khartoum (via Juba and Wau) or from East Africa (via Juba). However, there was little evidence that local traders in the target areas kept okra seeds, as local demand was being met by regular NGO distributions. The majority of NGO okra seeds were sourced from outside South Sudan.

As a result of the road closures, seed sellers in Juba were able to increase their demand from East Africa. However, there was no existing market link between the Juba traders and the local targeted market. Okra seeds were only being sold in Aweil and Wau but seed traders in Agok were purchasing other seeds from Aweil, demonstrating an existing market linkage that could be strengthened to include a range of different seeds.

Okra seeds Market-System Map After the Crisis



Response Options for the Okra Seed Market

The findings indicated that the in-kind seed distribution of traditional emergency response and development approaches often undermines markets in the region and inhibits the development of market linkages. This was demonstrated by a seed seller in Agok who, when asked why he had never stocked

okra seeds, responded that there was no demand because NGOs distribute the seeds regularly. The EMMA recommended that aid agencies explore the opportunity to replace direct distributions with vouchers and cash transfers and work with both existing traders and customers to increase supply and demand.

Programme Responses

The EMMA has had a significant impact on programme design for both the organisations involved and, to some extent, the mindset and modus operandi of NGOs and local populations.

NRC (Norwegian Refugee Council)

NRC has planned to organise seed and tool fairs, where vouchers will be distributed to allow households to purchase essential agricultural inputs. The 2,900 households will be able to buy the tools and seeds that they need from selected local traders. The traders will then be reimbursed via NRC's field offices.

NRC is currently carrying out a Supplier Capacity Assessment and selection process. The seed fairs are now planned to be rolled out in the first quarter of 2012. This programme is funded by the United States Agency for International Development (USAID) and The Office of U.S. Foreign Disaster Assistance (OFDA).

Mercy Corps

Based directly on the EMMA results and recommendations and a review of secondary information, Mercy Corps have designed the Market Oriented Rehabilitation of Agricultural Livelihoods (MORAL) programme, funded by the European Community Humanitarian Office (ECHO). This programme recognises the need to increase immediate food access for highly stressed returning households while investing in livelihood protection by actively engaging with market catalysts. The proposal also highlights the EMMA's findings regarding the potential for local markets to provide key agricultural inputs currently handed out by NGOs.

From the outset, Mercy Corps' proposal states that *"Mercy Corps proposes a progressive market based intervention that assists returning IDPs to meet their basic needs and that builds their ability to strengthen their food security going into next year's cultivation season"*^{vi}. Mercy Corps aim to meet immediate food security needs and, through cash transfers, market support and training, enable households to increase their cultivation, and therefore strengthen their livelihoods.

The MORAL programme has four expected results:

1. Through cash transfers, 1,000 returning displaced households are able to meet immediate basic food needs. Mercy Corps are using cash, rather than vouchers, as they recognise the multiple and competing demands that households face. In addition, financial budgeting training will also be given as a condition of receiving the transfers. Given that spending on food represents the greatest household expenditure, it is anticipated that the transfers will largely be used to buy food.

2. 200 labourers engage in community infrastructure projects that provide a cash injection to vulnerable households. Mercy Corps aims to engage in at least five Cash for Work (CfW) infrastructure projects that will assist the region's recovery and will support market interaction. CfW ensures that significant amounts of cash go into the local community, thereby increasing purchasing power. These projects will be identified in partnership with both the Abyei Area Administration and local communities and will focus on rehabilitation projects that have an immediate impact and engage a large number of labourers.

3. 1,500 households have the capacity to cultivate in 2012. Based on the EMMA findings, Mercy Corps will take a market based approach to provide returning farmer households with the seeds and tools necessary for successful cultivation. This means that Mercy Corps will not directly distribute any seeds or tools but will, instead, use a commodity voucher system so that participants can access local markets to procure these goods, in effect strengthening rather than undermining the market chain. Participants will receive technical training on seed storage and selection so that they can improve their ability to store their seeds through to the following planting season. This assistance aims to ensure that returning IDPs are able to cultivate to at least pre crisis levels and ensure that they do not require cash transfers again.

4. Local agricultural input market strengthened. In order to ensure that the local markets in Abyei and Twic County can provide the seeds and tools necessary, Mercy Corps will work closely with traders well in advance of the 2012 planting season to ensure that there is sufficient capacity. Mercy Corps will target seed traders and blacksmiths. This component is critical in ensuring that the rehabilitation of agriculture strengthens and supports local markets and livelihoods. It also provides the capacity for the market to increase supply to meet the anticipated increased demand from cultivating households.

Key Successes

In South Sudan, the EMMA tool was clearly adaptable and flexible. While the EMMA was specifically aimed at recovery rather than relief responses, it was able to analyse critical market chains, finding appropriate recommendations for market based interventions in the longer term. The EMMA also challenged the dominant mindset and ways of working of the international aid community.

In this sense, a key success of the EMMA was the use of the process, results and recommendations to strengthen advocacy. In kind assistance had been, and still is, prevalent by all agencies in South Sudan: NGOs, the Food and Agriculture Organisation (FAO) and by many UN bodies. The EMMA enabled

Mercy Corps and NRC to show the impact of in kind distribution to these agencies and to clearly show what opportunities exist to help facilitate new market linkages. This kind of impact cannot be underestimated in this context, where in kind aid has dominated and where market chains have been deeply affected by NGO actions. The EMMA results were outlined at the Food Security Cluster meeting and created not only a lot of debate, but also a lot of interest.

The EMMA also enabled the creation of new partnership agreements and contacts. ECHO and Mercy Corps had no previous partnership arrangements in South Sudan. However, ECHO is interested in funding new and appropriate approaches that seek to engage markets and the private sector which led to the initial approval of Mercy Corps market proposal.

Another significant success of the EMMA was the staff capacity building that the training brought about. For the NRC, a key achievement of the EMMA was that

the staff are now aware of the tool, the methodology and concepts behind it, and can use this again in future contexts. Moreover, the skills and central ideas that were learnt are directly applicable to the planned NRC Voucher and seed/tool fairs.

For Mercy Corps, not only has the EMMA process enabled effective market training and allowed the development of their market approach, but it has also allowed the staff to be able to do EMMA style assessments to add to the body of knowledge about market systems. Indeed, in response to an ECHO query, the South Sudan Mercy Corps team undertook an assessment of the sorghum market system. The team analysed the markets, produced a series of maps and offered some concrete conclusions regarding the use of cash and its impact on purchasing power. ECHO approved the MORAL proposal on the basis of the provision of this additional information.



Blacksmith cooperative in Wau displaying newly produced tools including maloda's

Lessons Learnt

While the EMMA in South Sudan had numerous important achievements, there were some equally important lessons learnt. Some of these lessons arose from context specific difficulties, rather than from the toolkit itself, and some represented problems that could arise with the implementation of EMMA anywhere.

As the situation in Abyei and the surrounding areas had not yet stabilised, the design of the analysis was somewhat problematic. While the EMMA team were able to collect enough information about the market systems, the analysis and results ended up focusing primarily on trade barriers. This was principally due to the aim to use the EMMA for recovery and longer term recommendations – when roads and cross border market linkages were less of an issue. This does not mean that the EMMA was not useful, indeed, it did exactly what was asked and formulated response options for a more stable context in the future.

What was more of a difficulty was the adequate collection of household data. This was due to several factors: training issues with staff and enumerators on data collection; no security clearance to return to Abyei and the fact that a large proportion of household income was in kind. This massively affected the ability of the team to collect reliable and representative household data. The scale of the target area, the number of enumerators that were used for the data collection and the number of days allowed for this collection hindered the process. In terms of the allocation of time, a choice was made to focus on building internal staff capacity. This meant that staff training on the concepts and processes of EMMA was given more time. In terms of sustaining market analyses and approaches, this may well have been time well spent.

In South Sudan, the participants had a wide range of ability, both in understanding core concepts and in their ability to speak English. This inevitably made the training more time consuming. The enumerators had not received enough training and did not have a sufficient grasp of the EMMA toolkit beforehand.

Finally, a key conclusion for the EMMA team was the extent to which in kind distribution was held as central to humanitarian and development assistance, from NGOs and UN agencies and their staff, right down to recipient communities. Initial efforts to reduce the role of NGOs in the direct supply of goods caused a great deal of uncertainty and resistance.

The EMMA experience in South Sudan exemplifies the flexibility and adaptability of the EMMA core logic. It clearly led to the design and implementation of more market based approaches. These approaches seek

to address immediate needs, laying building blocks for strengthened livelihoods in the longer term while avoiding potential negative impact on markets and their actors. While NGOs may not yet be ready to adopt different programmatic approaches to meet their beneficiary needs, the EMMA represents a significant stepping stone in the application of market analysis and market interventions. This is, in itself, a major achievement.

Acknowledgements

OGB would like to thank both Mercy Corps and the Norwegian Refugee Council for sharing their experiences and comments on the EMMA processes.

In particular, OGB would like to extend special thanks to Michael Gillespie, Mark Henderson and Diane Johnson from Mercy Corps for their invaluable input and insights.

From the Norwegian Refugee Council, OGB would like to warmly thank Quentin Le Gallo, Trine Wengen, Charles Inwani and Selvi Vikan for their time and efforts in providing essential information regarding the EMMA in South Sudan.

Acronyms

CfW	Cash for Work
ECHO	European Community Humanitarian Office
EMMA	Emergency Market Mapping Analysis
FAO	Food and Agriculture Organisation
IDP	Internally Displaced Person
IRC	International Rescue Committee
MORAL	Market Oriented Rehabilitation of Agricultural Livelihoods
NGOs	Non Governmental Organisation
NRC	Norwegian Refugee Council
OFDA	Office of U.S. Foreign Disaster Assistance
OGB	Oxfam GB
SAF	Sudan Armed Forces
UN	United Nations
USAID	United States Agency for International Development

Endnotes

i United Nations Office for the Coordination of Humanitarian Affairs (OCHA) Sudan: Abyei Crisis Situation Report No. 13 16/06/11. Available at: <http://reliefweb.int/sites/reliefweb.int/files/resources/OCHA%20Situation%20Report%20%2313%20on%20Abyei%20Crisis%2016%20June%202011.pdf>

ii Mercy Corps, June 2011, Baseline/Evaluation Scope of Work, Mercy Corps, Sudan

iii Ibid, OCHA Situation Report No. 13

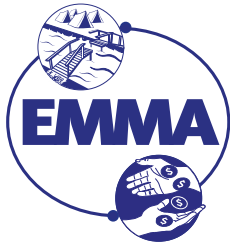
iv Mercy Corps and Norwegian Refugee Council (June 2011), Emergency Market Mapping and Analysis (EMMA): Report for the Abyei Crisis,

v World Food Programme (June 2011), Food Security Monitoring Report-Abyei IDPs in South Sudan, WFP VAM Group

vi Mercy Corps Scotland, (September 2011), Letter of Intent, Scotland



People have high hopes and expectations for development after the referendum. Rebecca Nyajung and her family also recently returned to southern Sudan after 21 years living in the north. "I'm hoping when the south gets independence we can expect to have good clinics, water, and can live well...I'm hoping we can have a better future." But with so much to do, southern Sudan will need a lot of help to meet these expectations. Work on building more sustainable markets can help support this process. Caroline Gluck/Oxfam



For information about EMMA and full reports please visit: <http://emma-toolkit.org/>



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Front cover: Blacksmiths at work, South Sudan. Photo: Gemma Swart