Labour and Housing market systems in Nangarhar Province, Eastern Afghanistan (Complex Conflict, Displacement, and Returnee Influx)

Emergency Market Mapping and Analysis

Full Report, 12st May 2017

Authors and Acknowledgements

This Emergency Market Mapping and Analysis (EMMA) was conducted by Oxfam, with support from partner organisation AHEAD, from the 24th of March to the 21st of April. The report was prepared by Stuart Kent (Emergency Food Security & Vulnerable Livelihoods Specialist) who led the process together with assessment team leaders Samir Ahmed (Emergency Food Security & Vulnerable Livelihoods Officer) and Naqibullah (Monitoring, Evaluation, Accountability, and Learning Officer). To request more information or to discuss the report, please contact the Oxfam Afghanistan Office in Kabul. The EMMA team is grateful for the dedication and hard work of a number of Oxfam and AHEAD staff, as well as members of the data collection teams.

List of Acronyms

ADA	Afghan Development Association
AFN	Afghanistan Afghani (local currency)
AHEAD	Assistance for Health, Education, and Development Afghanistan
ANA	Afghan National Army
ANSF	Afghan National Security Forces
AOG	Armed Opposition Groups
CSI	Coping Strategies Index
FCS	Food Consumption Score
FEWSNET	Famine Early Warning Systems Network
GoA	Government of Afghanistan
GAM	Global Acute Malnutrition
GNI	Gross National Income
HRP	Afghanistan Humanitarian Response Plan
IDP	Internally Displaced Person
IMF	International Military Forces
IOM	International Organization for Migration
IPC	Integrated Food Security Phase Classification
ISIS/DAESH	Islamic State of Iraq and Syria / al-Dawla al-Islamiya al-Iraq al-Sham
EFSVL	Emergency Food Security and Vulnerable Livelihoods
EMMA	Emergency Market Mapping and Analysis
SAM	Severe Acute Malnutrition
SFSA	Afghanistan Seasonal Food Security Assessment
UN OCHA	United Nations Office for the Coordination of Humanitarian Affairs
WASH	Water, Sanitation and Hygiene
WFP	United Nations World Food Programme
WFP VAM	World Food Programme Vulnerability Analysis and Mapping Unit
TVET	Technical and Vocational Education and Training

List of Terms

Chowk	A (typically urban) square or circle intersection
Danda	Practice of renting a productive asset (often a vehicle or rickshaw) for a fixed daily rate
Dekhani	Form of sharecropping where a poor household provides labour, while a better off household provides land and farming inputs for agricultural production. In return for labour the poorer household will receive 1/3 to 1/2 of the harvest (an arrangement most common to wheat production)
Kuchi	Nomadic social grouping residing largely in southern and eastern Afghanistan known for semi-annual migrations, and livestock focused livelihoods
Tazkira	Afghan National ID card

Table of Contents

List of graphs, images, tables, and illustrations

Report Summary

This study has unearthed an increasingly fragile situation in Nangarhar province, with extremely high levels of stress in both the casual labour and housing markets. The average vulnerable labour reliant family in districts of the province with high levels of returnee influx appears to be facing a monthly income gap of 2,000 AFN (roughly 29.5 USD or 27 EUR[1]), and housing which is approximately 1,150 AFN (17 USD/15.5 EUR) per month more expensive than in the past. This situation is expected to be exacerbated with the continuing return of both documented and undocumented Afghans from Pakistan throughout 2017, and with the additional challenges of the volatile security context. Throughout the course of this study Oxfam has observed varying degrees of down-skilling, a mis-match of skills in the market, housing expansion falling behind demand, increasing resort to sub-standard and unsafe housing, and numerous other factors already de-stabilising these two key markets. Beyond these concerns, the evidence shows a huge reliance of vulnerable families on (extended) family networks to find and maintain both labour and housing. For many this seems to be a form of resilience - stabilising a situation where one would often find much greater tension, distrust and social conflict. Yet for others it is less clear that how and where to manoeuvre, if these links are lacking.

From July 2016 onwards a mixture of domestic and regional political issues lead to increased harassment and pressure against Afghans residing in Pakistan; primarily in Khyber Pakhtunkhwa, to return to Afghanistan. This began an influx of roughly 620,000 documented and undocumented returnees in addition to conflict and natural disaster related displacement across the country of an additional 636,000 persons. In 2016 alone, more than 250,000 undocumented Afghans returned from Pakistan. Of these persons forced into movement (across categories), more than 300,000 are estimated to be located in the eastern province of Nangarhar, which borders Pakistan and connects through the Torkham crossing. This Emergency Market Mapping and Analysis (EMMA) was undertaken from March to April 2017 in Nangarhar by a team of Oxfam and AHEAD staff to understand the impacts of the repatriation of undocumented returnees and registered refugees from Pakistan into the province, in addition to persons forcibly displaced – IDPs, on two critical market systems: income earning from casual labour, and housing. These markets are of prime significance to the emergency food security and wider livelihoods survival needs of the populations being targeted for humanitarian assistance in the province as well as the host community. These three populations affected by forced movement (documented refugees returning, undocumented returnees, and IDPs), together with vulnerable members of the host community, form the “target group” referred to throughout this report.

This study had four overall objectives in reference to the casual labour and housing markets:

1. To understand the capacity of the labour and housing markets to absorb the additional supply of labour and demand for housing in light of the returnee influx and to identify and attempt to quantity any “gap”;

2. To map and understand the market system functionality, and capacity to contribute to meeting survival and livelihoods needs of families and communities in Nangarhar province vulnerable as a result of conflict, displacement, and forced return;

3. To draw out from the analysis a set of response recommendations on how to mitigate the likely obstacles and barriers to the target group accessing and satisfying critical income and housing needs, and to identify any opportunities to enhance or support the target groups’ use of these markets;

4. To use this analysis and learning process to inform and adjust Oxfam’s current and future humanitarian programming and to share this widely and advocate for other agencies and response stakeholders to also interpret and use this information as suits their individual mandates and capacity for intervention.

[1] Currency conversions should be regarded as estimates. The exchange rate used was that of May 9, 2017.

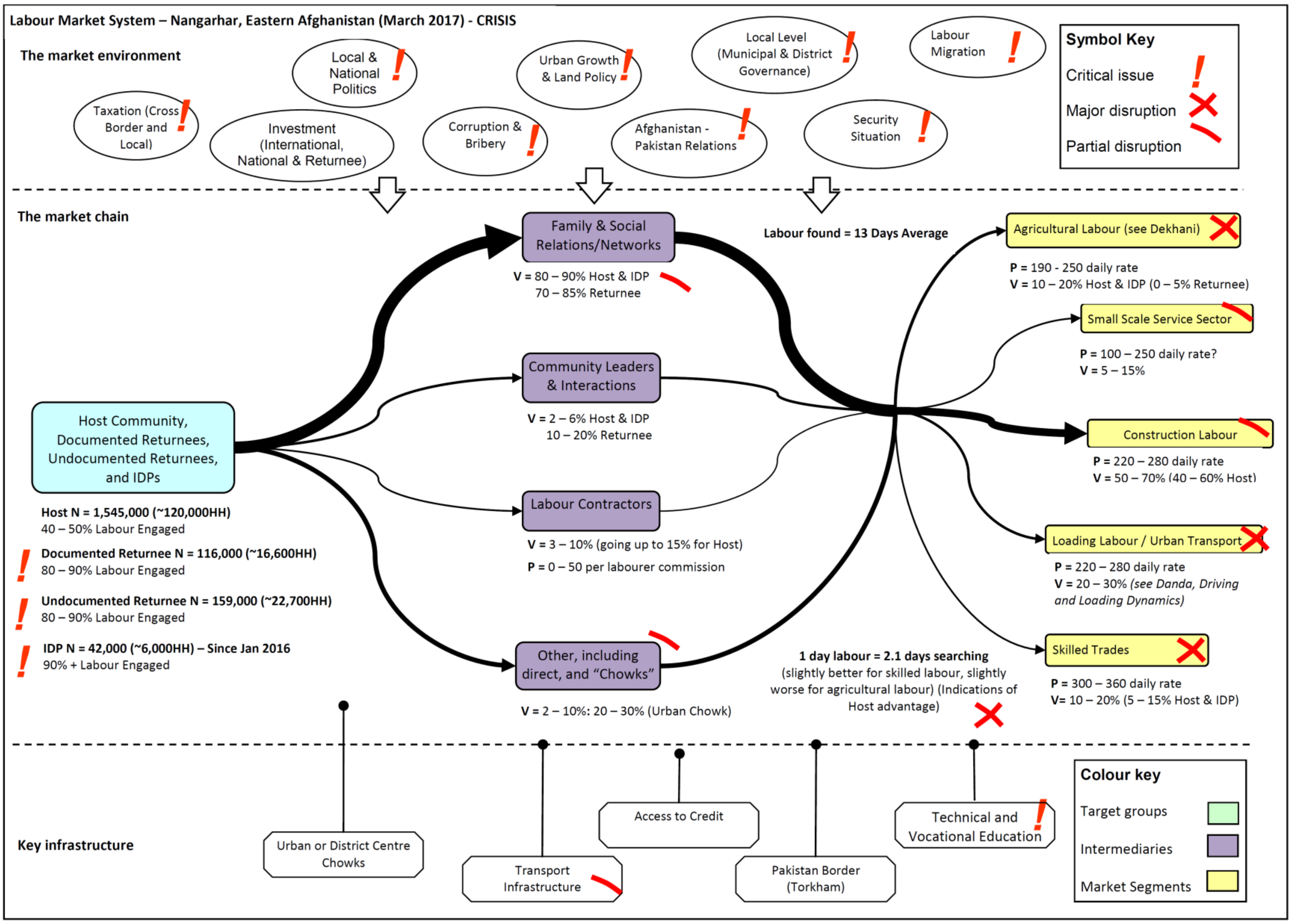
These objectives were set out based on expectations that the flow of returns will continue throughout the second part of 2017, and that the security context of Nangarhar will likely continue to be challenging.

The labour market system (findings and recommendations)

The casual labour market system in Nangarhar is under an extremely high degree of stress as the result of a rapid increase in supply of labour with only a modest increase in demand (mostly concentrated in construction and the sale of basic commodities). The average daily wage has fallen, since March 2016, by an average of 12% for unskilled and 20% for skilled forms of labour across five key industries (agriculture, construction, loading and transport, small scale services, and skilled trades). In parallel, job seeking has become more challenging and competitive. The average labour reliant household reports finding an average of 13 days work in March 2017, in comparison to 18 days in March 2016. Taken together, this EMMA suggests a “gap” of 2,000 AFN (roughly 29.5 USD or 27 EUR) per month – this is the amount of income that the average labour-reliant household is missing due to the decreased ability of the market to supply sufficient labour opportunities.

Access to the labour market in Nangarhar is highly mediated by family and social networks, though community leaders, private contractors and public labour seeking also play a role. As yet, there is little evidence of discrimination on the basis of displacement category (whether documented or undocumented returnee or internally displaced person (IDP). However, there is evidence of emerging stress – and the economic impact on household budgets is felt by all who rely on income from labour. Returnees are generally perceived to possess a higher degree of skill than the host community due to prolonged (on average more than 20 years) residence in Pakistan. However they are also seen as lacking “familiarity” with Nangarhar related to both the connections to facilitate the finding of labour, as well as the “doing of labour” – which we interpret to refer to both the method of performing tasks, for example styles of construction and confidence with specific methods and materials, as well as with familiarity with the context in terms of prices, supplier links, ability to negotiate locally etc.

In terms of the gendered nature of the labour market, women’s access is severely limited in Afghanistan according to a range of cultural constraints and structural inequities in access to information, education and the public sphere[1]. For example, while the team was able to interview 66 female household representatives from a sample of 185 households, the team was only able to find 1 female employer among the 66 identified. Women do participate in the labour market though their contributions are too often discounted as domestic or home labour, even if contributing income or sustenance. Their perspectives and capacities differ in significant ways and it is incumbent on humanitarian and development agencies to account for this. For example, even though shop keeping is reported as the overall most profitable skill set, women report this even more consistently than the overall population – 29% versus the overall figure of 18%. In contrast areas often considered most feasible or “appropriate” for woman centred livelihoods, such as handicrafts and tailoring come in at 4% and 2% respectively. Clearly women are interested in a wider variety of economic activities and perceive an opportunity to engage in retail labour across a range of activities and sale types; agencies must be more creative in challenging the current habit of intervening in low profit sectors and to link home based production to opportunities to sell on the open market. Community engagement and culturally sensitive strategies are also required to promote, albeit long term, social acceptance of women’s economic roles. In a recent urban labour study, lack of family permission was the top cited barrier for women seeking employment according to both employers and employees[2].



Key labour market findings

- There has been a significant decrease in daily wages, and a simultaneous parallel decrease in the availability of labour per household. The average days of labour per month has decreased from 18 days to 13 days; despite households (primarily men and boys) still seeking labour at a similar frequency and rate.
- With the exception of some host community families, the target group (especially the less wealthy) are **not** largely reliant on agricultural labour. The agricultural labour this is performed is often through sharecropping (*dekhani*), which can be marginal in terms of livelihoods outcomes.
- Access to the labour market is heavily mediated through family and social connections. Skill possession alone does not guarantee the ability to overcome the relationship and information challenges to match those skills to demand.
- There are some significant skill differences between the returnee and host communities and to an extent also the IDP households. There is a perception that returnees may have the higher level of skills (especially in the construction and small trades sectors), but achieving "familiarity" with the new context is said to take several months.

- All of the five key labour market segments[2] have been affected by the returnee influx but demand is still evident and, with the exception of agricultural seasonality, reasonably consistent for key skills, especially those related to construction (e.g. carpentry, building painting or masonry).

- As yet, there is minimal evidence of discrimination in the labour market on the basis of displacement categories. Negative perceptions around returnee and IDP employment, when they have been observed, generally focus on security concerns (e.g. if IDPs originate from insecure areas), and a lack of familiarity and trust.

Labour market recommendations

- If working on supply side of technical and vocational education and training (TVET), NGOs, UN and government agencies should consider carefully the training type in relation to demand and triangulate household perceptions with those of employers. This study suggests carpentry, building painting, tailoring, masonry and mechanics may be feasible.

- In TVET interventions, whether conceived as early recovery, reintegration or economic development, ensure that sufficient resources are dedicated to supporting job seeking, work placement, and labour information sharing. To the extent that there are some modest skills gap which need to be filled, the social and cultural challenges to be overcome in job-seeking are perhaps more significant.

- In line with the challenges highlighted by previous studies in Afghanistan[3], if TVET is being considered, a formalised 6 month qualification with job seeking support is the recommended minimum standard for meaningful outcomes.

- Agriculture and livestock are a minor source of income for the majority of the target group discussed in this report. Throughout, displacement, returnees and IDPs have adopted a wider diversity of labour types and skills, while for the host community themselves it is generally the more well off that have the necessary access to land to really profit from agriculture. Emergency livelihoods programming in response to the refugee influx must prioritise non-agricultural livelihoods, especially for the returnees, who have neither the land access or skill sets, and in general lack the interest and favour more lucrative urban and peri-urban possibilities.

- Shop-keeping and street vending is a widely held skill (especially amongst the returnees) and it is widely perceived as the most profitable type of activity. Though there is reason to assume increased demand for core commodities as a result of the returnee influx, this segment already appears to be highly competitive (and at provincial and district centre level, crowded). Therefore, there is a need for small business training focusing on financial management, product diversification and marketing as an alternative to start up grants. If start up grants are to be used, consider using them to support local / village level traders able to bring supply to a more local level. In line with the gender analysis above, consider bringing a focus on women's empowerment to this component.

- Cash for work programmes run by humanitarian agencies are recommended as a means to absorb labour supply and there are some possible linkages to the expansion of social and civil infrastructure, as well as bringing the housing of the most vulnerable up to a minimum level of acceptability. Since humanitarian interventions can be ad hoc and short term, consider methods by which to influence any future – larger - government public works programmes in a structural way; for example to employ vulnerable members of all communities (host, returnee, IDP).

[2] As shown in the mapping later in this report: agricultural labour, small scale service sector, construction, loading/transport, and skilled trades.

- While there are few current indications of major discrimination against returnees as a group, it can take several months to re-establish networks required to efficiently seek and find labour, and it is reasonable that with the further influx of returnees expected through the second half of 2017 tensions may increase. Implementing agencies should be aware of these risks, and begin working already with longer term actors and stakeholders to identify pressure points, including in social and physical infrastructure. Those in humanitarian leadership positions in Nangarhar should bring together or expand a social cohesion or community engagement group for coordination in the province, and to promote both a conflict sensitive and do no harm approach.

- Although not directly investigated within the scope of this study, it is reasonable to suspect that there are unknown psychosocial effects related to reduced employment for breadwinners, and a potential negative impact on gender and family relations caused by distress, the conflict environment, and loss of the economic capacity to provide. It would be advisable to integrate a gender and protection lens in any livelihoods re-integration programming (using for example a Cohort Livelihoods and Risk Analysis (CLARA) type methodology).

- This EMMA has included observations of child labour and protection issues which, although not the focus of data collection, must be mentioned. There are some signs of increases in longstanding areas of concern, especially with regards to bonded and child labour, however there is no hard data yet. Regardless these concerns must be better monitored and protections advocated with support of the relevant Protection cluster and sub-clusters.

The housing market system (findings and recommendations)

The housing market system in Nangarhar has also been highly impacted by the returnee influx. There has been a large increase in demand for housing which has not been matched by a sufficient increase in housing stock. A number of longer term policy and strategic issues compound challenges in expanding the housing market in Nangarhar, including land use and urban growth policies, local level governance challenges and insecurity. Additionally the province, and especially urban and peri-urban Jalalabad, was already under significant growth and expansion pressures prior to the onset of the influx of returnees. Rented housing is the most common form of accommodation for all categories of the target group (host, returnee, and IDPs).

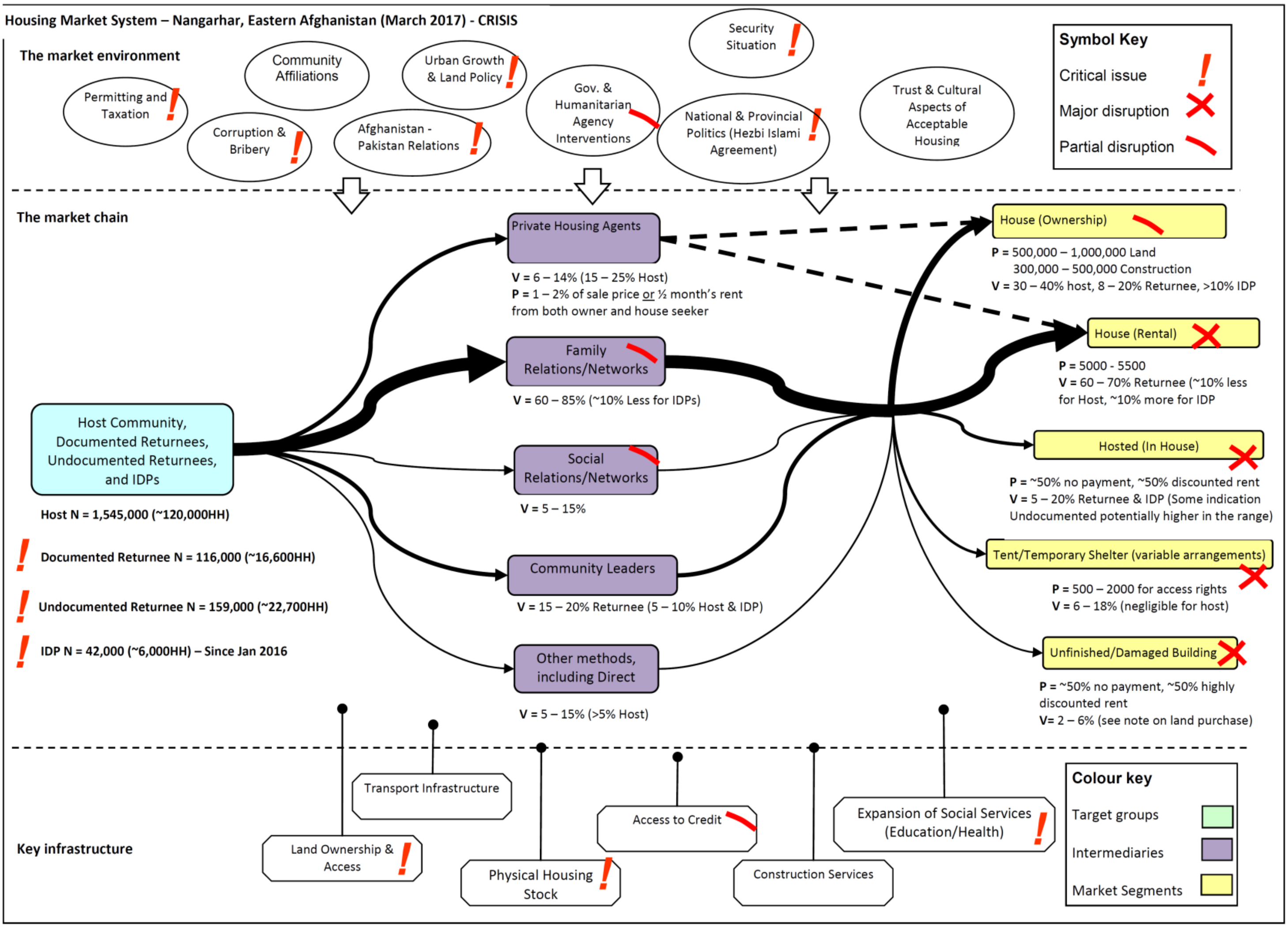
Two gaps exist in the housing market: First, we estimate that the average rental price for a modest house suitable for a family of seven has increased from 4,100 AFN (60.5 USD/55.5 EUR) per month to 5,250 AFN (77.5 USD/71 EUR), against March 2016 – **a gap of 1,150** AFN (17 USD/15.5 EUR) **per month**. This makes the average monthly rent more than the total reported monthly income of approximately half of the households surveyed for this study. Second, there is both a physical (housing stock) and economic (affordability) gap in access to decent housing[3]. An estimated 5 – 20 percent of returnees and IDPs are occupying some form of hosting arrangement inside a permanent building, 6 – 18 percent are within tents or temporary shelters, and 2 – 6 percent are occupying unfinished or damaged buildings. The latter two of these categories represent a clear "gap" in the ability of the housing market system to provide decent, safe accommodation.

Similar to the labour market, the housing market in Nangarhar is highly mediated by family and social networks, though community leaders and private housing agents play a role. There is moderate evidence of discrimination on the basis of displacement category in terms of housing access, though what we might consider to be discrimination is challenging to disentangle from the impact of poverty and displacement. On average 57% of returnees and IDPs report that eviction from their current residence is possible, compared to

[3] Definitions of "decency" in housing are complex and contestable. In this report decency is defined by housing ownership or rental, while accommodation in tents (whether hosted or not) or damaged or unfinished buildings are considered sub-standard options. Hosting arrangements inside a permanent building can be either sub-standard (due to factors of overcrowding and insecurity of ongoing access) or decent, dependent on the specifics of context and the relationship between hosted and host.

14% of the host community. Landlords and private housing agents report that returnees face the risk of eviction on the basis of failure to pay rent, overcrowding (renting a house which is this filled with “too many” families), or a lack of trust or security fears – the latter mostly relates to IDPs originating from the southern parts of Nangarhar where Islamic State of Iraq and Syria (ISIS) has a presence. The common practice of requiring an advance of 3 months’ rent at the conclusion of a rental deal has also been extended for returnees in many cases to 6 months, and in rare cases the entire 12 months duration of the housing arrangement. A lack of official identity documents and letters of guarantee influence this demand for very significant up-front payments.

Like the presentation of findings from the labour market analysis, the data and information in this report can be analysed in any number of ways and Oxfam encourages users to draw conclusions and reflect in line with their own, and their agencies’, mandates and capacities.



Key housing market findings

- There is significant upward pressure on the price of rent in both urban and rural Jalalabad being driven by the influx of returnees from Pakistan.

- This shift in demand has concentrated market power with landlords, who are increasingly requiring certain categories of people – especially those who lack key documents such as a *Tazkira* and a letter of guarantee – to pay an increase amount of rent up-front; from 3 months to 6, or in rare cases 12 months (the entirety of most rental durations).

- Returnee and IDP families are increasingly occupying sub-standard housing options (tents, unfinished and damaged buildings), from less than 5% of returnees and IDPs occupying either of these housing types, to 5 to 20% occupying each. In total, the upward-end estimation is that just less than half of IDPs and returnees are occupying sub-standard housing options.

- Housing costs and access to public services and livelihoods options are pushing in opposite directions: the most expensive housing facilitates access to employment, education and health services, and tends to be more secure, yet places the greatest economic burden.

- Access to the housing market, similar to the labour market, is also heavily mediated through family and, to a lesser degree, social connections. There is some evidence of discrimination in the housing sector with regards to displacement (at least to a greater extent than that observed in the labour market).

- The majority of IDPs and returnees (both documented and undocumented) report an intention to remain in Nangarhar, with the implication that secondary movements to other areas of Afghanistan may be relatively minor.

Housing market recommendations

- Include in any unrestricted cash transfer programme, especially multi-purpose cash grants, at minimum at least the value of the estimated rent affordability gap (1150 AFN per month); while maintaining flexibility to adopt an increasing value for more vulnerable households. Alternatively, consider using rental vouchers and linking directly to landlords for increased security (and potentially acceptance and/or avoidance of demands for excessive up-front payments by vulnerable households).

- Consider the feasibility of supporting newly arrived households to meet lump-sum rent advance requirements, either directly or through micro-finance institutions. Though maintain targeting to those most vulnerable (by needs indicators, **not** by displacement or returnee category, or former legal status in Pakistan) so as to avoid local market distortions.

- Expansion of housing stock takes time. Consider quick impact options for market based temporary shelter programmes to increase safety and decency of sub-standard housing types. This could include linking improvements with cash for work to use community labour to make simple physical improvements to sub-standard housing; for example completing walls, doors, internal divisions. Or by providing small housing improvement grants for situations of hosting in tents, and providing vulnerable households with vouchers for construction services. Land ownership arrangements are complex, and external agencies may face challenges in intervening directly to construct even temporary or semi-permanent structures. In this situation a market based approach provides not only further choice to the beneficiary, but also allows for more local navigation of which minor improvements in safety, and quality, are acceptable in the context of a multitude of complex land access arrangements.

- Returnees are arriving with little information and knowledge around how to navigate the formal and informal contracting arrangements being used to secure housing. Consider including education and outreach on house finding and contracting practices alongside other community engagement activities and/or engaging with landlords (or in rural areas the Maliks who tend to exert some influence over market operation) to discuss alternatives to up-front payment beyond 3 months and flexibility in documentation for informal contracting.

- Consider methods of supporting vulnerable households to gain access to basic identity documents (as well as qualifications) upon arrival in Afghanistan, as these can be vital for securing housing.

- Advocate for an increase in temporary, and market based, shelter support (in funding and intervention terms) as an immediate measure to improve living conditions (whether through cash or voucher based programming). Avoid expensive permanent housing programmes unable to deliver in the short term, inappropriate for the most vulnerable, or which are likely to run up against complex land tenure issues which external agencies are not well placed to resolve. Empower vulnerable families with the financial resource to negotiate their own solutions.

- Operational humanitarian agencies who are implementing on the ground in Nangarhar should be engaging more with longer term actors and stakeholders to advocate for sensible urban growth policies in Jalalabad, and land access province wide. These are large issues which have already been under discussion for some time, however, greater connection of the response with evidence from the ground, and highlighting the potential costs of failure to account for returnee population growth, may encourage action.

Conclusions

Complex conflict and displacement, including the returnee influx from mid-2016 onwards, has severely impacted the ability of the labour and housing market systems in Nangarhar province to meet the needs of vulnerable host, returnee and IDP communities. This Oxfam study has mapped the function of these two key markets and, drawing from a reference situation set in March 2016, has identified and quantified gaps in the form of a much reduced capacity for these markets to supply both labour income, and decent housing at accessible pricing. The current situation continues to place the target group (vulnerable host community families, documented refugees returning, undocumented returnees, and IDPs) under a significant degree of economic stress and has implications for multi-sector vulnerability and needs in terms of food security, shelter, Water, Sanitation and Hygiene (WASH) and protection.

A number of market based humanitarian interventions have been recommended which, in the short term may help provide immediate support to those with needs related to these markets; essentially those vulnerable and marginal families in Nangarhar seeking work and homes. Market based interventions include cash for work (with a potential linkage to minimal improvements to sub-standard housing), shifting from emergency to temporary shelter with a focus on rent support, addressing the high cost of increasing demands for 6 months of rent advance, and using cash for work or vouchers to ensure that housing meets minimum protection requirements in the context of Afghan culture (for example walls and doors to create privacy around tents). Ideally, pricing in the value of the actual gaps in income and housing affordability in the use of multi-sector cash grants or, in the case of housing a rental voucher – potentially with landlords directly reimbursed, is also a way forward. If using a housing voucher to cover the rental gap, this effectively operates as a subsidy with the household completing the remainder of the payment to the landlord.

Based on the labour and housing gaps identified here, we recommend a multipurpose, multi-round (up to 6 months) cash transfer valued at a reasonable portion of the minimum expenditure basket so as to align to the identified gaps (with allowances for highly vulnerable groups). Such that the housing gap and income gap are covered at minimum (Oxfam recommends that the housing gap be marked against the shelter component of any basket, and the income gap against the food component). Given the complexity of these markets, and the amount of social labour and networking required for returnees and IDPs to re-strengthen the networks by which both labour and housing are mediated, Oxfam suggests that one of the best ways in which the vulnerable can be supported is to be given time to do this necessary re-establishing.

There is reason to believe that with the current contextual scenario, and near certainty that response will be required for a further returnee influx, a longer term cash grant provided to a household consistently over several months may be more effective than a large lump sum payment of equivalent value provided either at the border or after settlement. There are a number of operational challenges in delivering multi-round cash in Nangarhar province, but there is a strong technical rationale for looking at ways to overcome these. This is in large part due to the primacy of family and social networks in securing access to jobs and housing. To have lump sum funds to invest is one thing, but to have the connections to facilitate action is another (perhaps more time consuming) concern. This is a technical discussion which implementing agencies and donors should contribute, and the national Cash Working Group has already begun to approach the issue of multipurpose cash grants, their valuation, and use.

In the longer term, there are some limited opportunities for TVET and labour market interventions in spite of the challenging supply and demand situation. However, training interventions – especially in the skilled trades must take care to dedicate sufficient resources to job seeking and placement support, as well as ensure that qualifications are sufficiently formal and in depth so as to be recognised and meaningful. A cursory glance at the labour market map confirms that, with the importance of mediators and intermediaries (often family) in the labour market, the question is not so much how to train a carpenter but how to find a carpenter work when carpentry is not the family business or not the traditional business within a known and trusted network. Opportunities also exist in the agricultural and livestock sectors, primarily for the minority of the host community and IDPs who possess this skill-set. However these must be approached with a degree of caution, and agricultural livelihoods interventions are not recommended as appropriate interventions targeting returnee populations in the province (due to a lack of familiarity, will, and access to land).

This study also presents evidence that, so far, a degree of goodwill exists around the re-entry of the returnees into both the labour and housing markets (with a higher degree of friction in the latter). This should not be taken for granted, as the nature of the market is to link households together. Wages fall and rent rises in a way that appears to affect all households. Integrating conflict sensitivity into community engagement and outreach is highly important, as well as ensuring a close connection between the shorter term humanitarian response and the longer term governance and development programmes in the province – such as ensuring that the work under the Citizens Charter in Nangarhar accounts for the humanitarian realities and stresses. The humanitarian community must also engage with both the government and longer term development actors (there is a group of concerned agencies for which UN-HABITAT is a focal point) in the ongoing discussions around land rights and longer term re-settlement, as well as municipality and district level governance and policies around urban growth and service provision.

Finally, throughout the research Oxfam observed that in terms of the pathways by which documented (formerly refugee) and undocumented returnees access the labour and housing markets, there are very few significant differences. This applies as well to outcomes of access to these markets in terms of income from labour and the ability to secure housing. From this Oxfam concludes that, once past the border, it would not generally be appropriate to target beneficiaries for humanitarian intervention on the basis of their former legal status in Pakistan. Oxfam recommends instead to target on a needs basis in line with the sector of intervention.

While this EMMA study is based on thorough field research in Nangarhar, Oxfam recognises that it still represents only a snapshot of a situation that is in constant flux. It is therefore important to continue to monitor the situation of the local labour and housing markets, especially as the influx of returnees is expected to continue in the foreseeable future and the security situation is far from stable.

Section 1: Emergency Context

1.1 Afghanistan

Afghanistan has been in protracted conflict for more than 4 decades, and continues to experience widespread, multifaceted, and complex humanitarian crises' related to internal and regional conflict, geo-physical vulnerability, and the debilitating effects of fragile governance and chronic poverty. In the last twelve months emergency needs grew rapidly; in significant part due to sharp increases in both conflict-induced internal displacement, and the ongoing influx of undocumented returnees and documented refugees from Pakistan and Iran.[4] According to the United Nations Office for the Coordination of Humanitarian Affairs (UN OCHA), more than 636,000 persons were internally displaced in 2016[5], whilst nearly 620,000 returned from Pakistan alone (249,832 undocumented; 370,102 documented).[6] More than 90% of these returns occurred in the second half of the year, and although the pace slowed over the winter season, returns are resuming *en masse* with throughout the spring and summer of 2017. The International Organization for Migration (IOM) has recorded an average of 680 returns per day of undocumented returnees alone throughout 2016.[7] With limited shifts likely in the political and conflict drivers of forced mobility, 2017 is likely to see at least 450,000 new IDPs and up to 1 million further undocumented and documented returnees in Afghanistan.[8] In sum, more than 9.3 million people are anticipated to require humanitarian assistance in Afghanistan during this year.

The overlaying of chronic poverty, conflict, and vulnerability with humanitarian shocks has resulted in increasingly severe levels of need. Afghanistan faces a Gross National Income (GNI) per capita of just $610 USD[9] (2015 data) and more than 30% of the population tends to experience a calorie deficiency in terms of total food intake.[10] The population of Afghanistan is also strikingly young; approximately 47% of the population is under 15 years of age.[11] Nutrition surveys from 2016 show Global Acute Malnutrition (GAM) prevalence from 10.9 to 20.7% and Severe Acute Malnutrition (SAM) rates above the emergency threshold (15%) in 20 of Afghanistan's 34 provinces. By Nutrition Cluster estimates, this translates to 1.3 million children under 5 likely to require treatment of acute malnutrition in 2017. The stunting rate among children under 5 is 41% and micronutrient deficiencies are prevalent, with 33% of reproductive age women being affected by anaemia and a vitamin A deficiency rate of 47% in children 6-59 months.[12] The national food security situation remains similarly concerning; an estimated 1.6 million Afghans (6%) experience severe food insecurity and a further 9.7 million (34%) experience moderate food insecurity.[13] The last lean season, which ran until approximately the end of March 2017, came on the back of a 2016 crop harvest well below the 5 year average (with a deficit of 1.2 million metric tonnes) and mounting evidence indicates potential stress on the price of basic food commodities and depressed casual labour markets in areas affected by high levels of returnee settlement follow mass repatriation. The Famine Early Warning Systems Network (FEWSNET) forecasts stressed outcomes (IPC level 2) across the majority of the country through to late 2017 but notes that in areas; including Nangarhar Province, where undocumented returnees of Pakistan are concentrating these returnees (many of whom have not received meaningful assistance) are facing Crisis (IPC 3) outcomes as they attempt to re-establish livelihoods.[14]

This market assessment covers a target group containing four categories of population related to the complex dynamics of population displacement, forced and unforced movement, and conflict. This assessment conducted data collection and analysis in a method to enable identification between differences in these categories as much as possible. Therefore, throughout the report we present data across each separate category to the extent that it is reasonable (and the data can support) doing so. At times this shows differences in the profile of each category, but in some aspects of interactions with the labour and housing markets, it is important to show similarities in how the groups access and utilise these key markets. The following definitions are used in the research:

Host community: *Residents of Nangarhar province currently settled in a location which is considered their "origin" by substantial family, tribal, and land ties.*

Documented returnees: *Persons, who have fled or were otherwise displaced to Pakistan and who, at the time of return to Afghanistan, were holding official refugee status in Pakistan. These people have, in general, been assisted with a re-integration payment or package.*

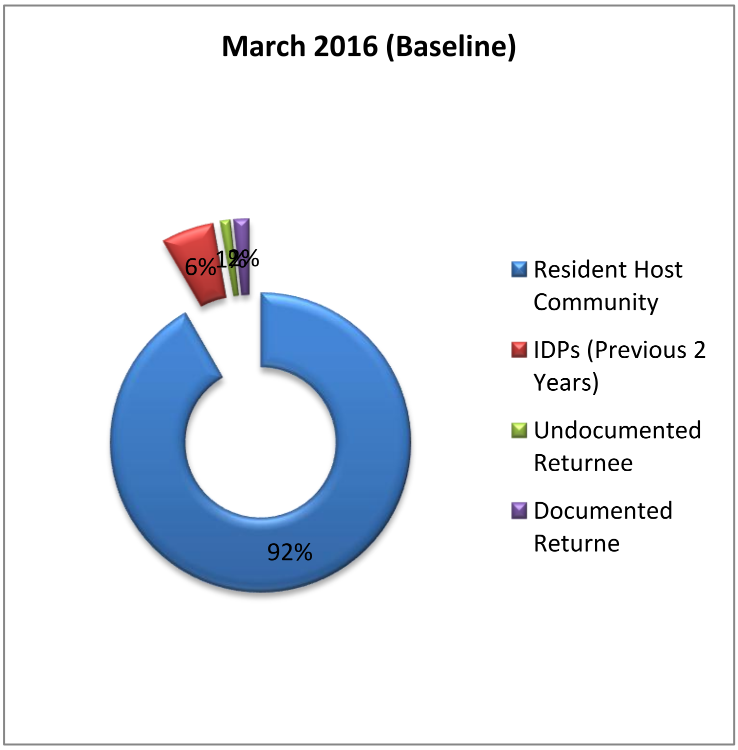
Undocumented returnees: *Persons, who have also fled or were otherwise displaced to Pakistan and who, at the time of return to Afghanistan, did not hold a current official status as refugees in Pakistan. The fact that these people do not have refugee status can be explained by a variety of reasons, including, for example, fear or prosecution or insufficiencies in the registration process, or they may have previously had refugee status, losing it upon returning to Afghanistan, and then re-entered Pakistan as undocumented persons.*

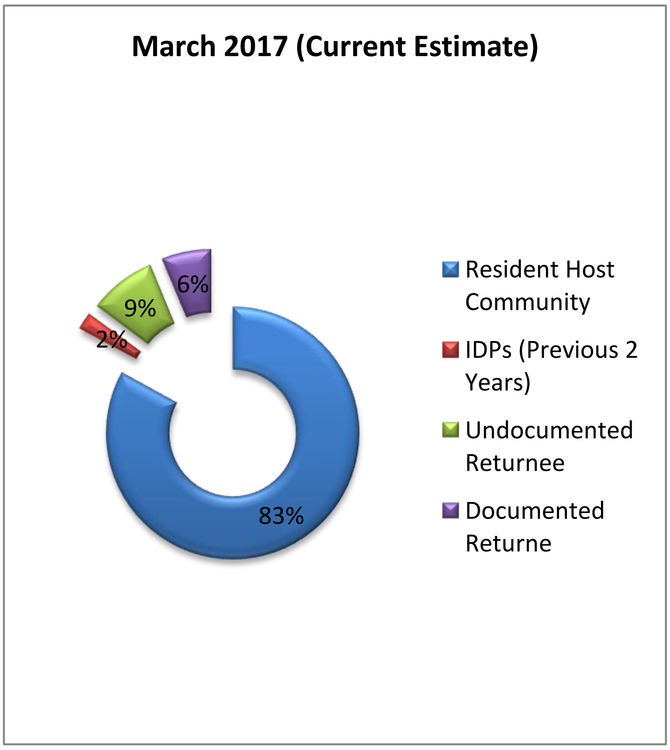
Internally displaced persons: *Persons, who have been displaced either by conflict or natural disasters and which have arrived to Nangarhar either from within the Province, or from another province of Afghanistan.*

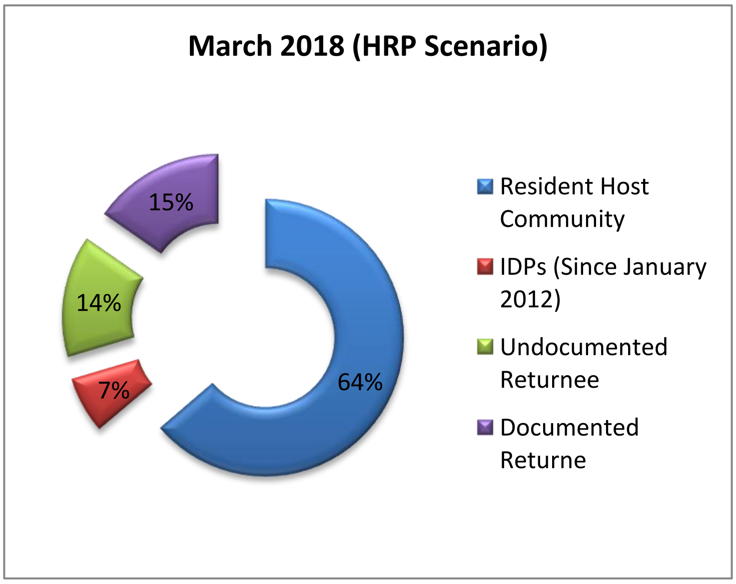
1.2 Nangarhar Province

Nangarhar province sits on the eastern border of Afghanistan and is a key agricultural region as well as a commercial and trade connection to Pakistan; less than 140km stand between the provincial capital Jalalabad and the Pakistani hub of Peshawar. Nangarhar contains 22 districts with a total population of approximately one and a half million[15], including the provincial centre Jalalabad city with a population of 356,000 (2015).[16] More than 75% of the population is rural and the provincial economy rests heavily on agriculture and seasonal labour. Staple crops include wheat, rice, and maize and a selection of vegetables grown for both home consumption and market. Olive production is also widespread, and some evidence suggests strong growth potential in the fruit tree sector[17] (especially plum, apple, pomegranate, almond and apricot). However, illicit opium poppy remains the most important cash crop for Afghan farmers and an estimated 45% of Nangarhar farmers are engaged in production (2016 estimate[18]). Demographically, the province is primarily composed of Pashtuns, with smaller groups of Pashayee, Tajiks, and Gujjars.[19] The area's social, economic and political dynamics are heavily influenced by human mobility and ongoing insecurity. For example, and although data are difficult, by some estimates up to 60% of the Provincial population migrated to Pakistan at the peak of the conflicts throughout the 1980's and early to mid 1990's[20]. Just prior to the onset of the current returnee crisis, an estimated 59% of the population of Jalalabad city itself was reported to be either IDPs or Returnees, with another 25% economic migrants and only 16% of the city population "residents" (2014 data from a random sampling of 495 households[21]). Given the current rate of returns, these figures are expected to continue to rise. Also of note, the annual Kuchi migration is estimated to number more than 200,000 in the winter and 50,000 to 100,000 in the summer.[22] These migrations add to the complexity of land tenure issues in particular as Kuchi access can be a source of tension in many of the same areas now experiencing also the returnee influx.

Graph 1 - Nangarhar demographics by status: baseline, current, and projection







* The "HRP" scenario is constructed by pulling from the HRP the anticipated number of additional returnees (up to 1,000,000) and IDPs (450,000) in 2017 and allocated these numbers the Nangarhar in the same status types and proportions as were received in 2016. This is clearly a simple projection, and much can change as the result of insecurity, Afghan and Pakistani government policies, as well as the influence of the humanitarian response itself. It is however, a useful exercise to consider how the situation may evolve in 12 months time.

According to recent security analyses the majority of districts in the province are currently disputed (either static or actively) between the Government of Afghanistan (GoA) and Armed Opposition Groups (AOG); resulting in most areas of Nangarhar recording between 104 and 207 security incidents during 2016. Islamic State, known as ISIS or Daesh, has established a foothold in southern Nangarhar and increasingly competes with both the Taliban and the GoA. Nangarhar is thus, by these measures, one of the 6 provinces most affected by insecurity (of 34). Against this backdrop of insecurity the province has been heavily affected by the influx of returnees from Pakistan. Approximately 334,000 documented and undocumented returnees are reported to have registered an intention to reside in the eastern region (primarily Nangarhar) when crossing the border.[23] Approximately 10% of households in Nangarhar also report hosting friends and relatives displaced by internal violence; these households are more than twice as likely to be food insecure.[24] Political and security prospects for 2017 are of concern. Nationwide the Afghan National Security Forces (ANSF) has become increasingly inactive over the last three years, and support by International Military Forces (IMF) has, although increasing in frequency, been focused defensively. At the same time, 2016 saw the highest rate of AOG initiated security incidents on record. In short, the trends indicate that the GoA and its international allies are increasingly defending key pockets and provincial capitals against opposition groups which control or contest increasingly large proportions of the country. The last fighting season saw challenges launched against some of these capitals (especially Kunduz City in the north and Lashkar Gah in the south). In the remainder of 2017, these trends are likely to continue; in Nangarhar specifically with heightened hostilities and the added complexity of ISIS presence – generating increased displacement, humanitarian need and market disruption.

1.3 Humanitarian Response to Date

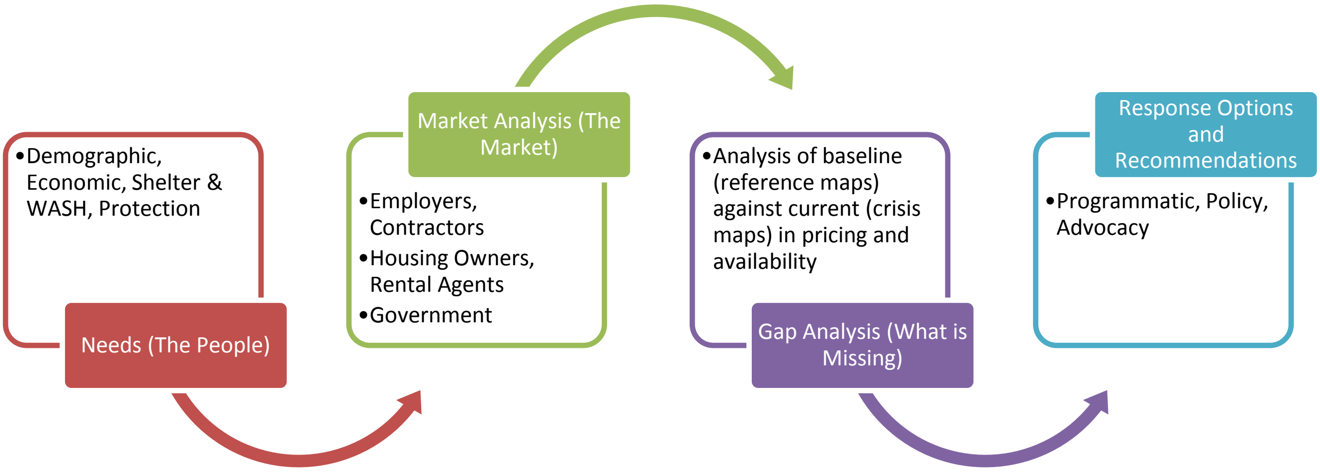
According to the combined Food Consumption Score (FCS) and Coping Strategies Index (CSI) presented by the Afghanistan 2016 Seasonal Food Security Assessment just prior to the last national harvest, Nangarhar was the most food insecure province in Afghanistan with 84% of households food insecure; 36% severely. This is against a national average of 41%.[25] Access to basic services such as health, shelter and education has also come under immense pressure in the province. For instance, the Nangarhar Regional Hospital is reported to have experienced a surge in paediatric admission (197 in 24 hours) during early January due to a combination of winter temperatures, additional IDP and returnee populations in the area, and limited decentralised health facilities. Land and rental prices are anecdotally reported to have increased by up to 200% (to 8,000 AFN (118 USD/108.5 EUR) per month for a standard dwelling), while over-supply of casual labour has depressed the daily rate from roughly 350 to 250 AFN (from 5 USD/4.7EUR to 3.7 USD/3.4 EUR). Commodity prices, especially for staple food items, are also said to be experiencing increases and localised hikes.

The humanitarian response to conflict, displacement and returnee influx in Nangarhar has focused on the provision of aid through food in-kind, cash transfer programming (at times with a multi-sector approach), and livelihoods support through provisional of agricultural packages. Specific initiatives include cash based winterization support from December 2016 to March 2017, and assistance at the border to undocumented returnees (eligible for one month food rations and transport assistance) and registered refugees returning to Afghanistan (eligible for UNHCR resettlement payments). Child vaccination for measles and polio, vitamin A supplementation, de-worming and screening for acute malnutrition are have also been conducted at border entry points. Alongside purely humanitarian interventions sit a wide range of longer term and development focused programming, including limited quantities of skills and vocational training, microfinance provision, and agricultural extension and outreach. The likely evolution of the humanitarian response includes a further shift in coming months to cash transfer programming for food and shelter objectives; and potentially the introduction of a greater degree of multipurpose cash grants - or acknowledgement that current cash interventions are not meaningfully restricted to particular forms of expenditure (despite their sectoral banners). As a generally principle of cash transfer programming, restrictions should not be introduced unless there can be shown clear evidence for why this restriction in beneficiary choice is justified in terms of positive impact for the beneficiary, or pressing social/community concern. In large part, this is likely to come in the form of simply clarifying that the vast majority of cash transfers being conducted are in no meaningful way restricted in terms of beneficiary spending and so are already essentially multi-purpose grants. It will be up to the humanitarian community to acknowledge this reality in terms of developing enhanced monitoring tools and flexibility for actors to work beyond a single set of sector objectives and programme designs.

The intentions of government actors, including the provincial departments of Labour and Social Affairs; Information and Culture; Refugees and Repatriations; and the Rural Rehabilitation and Development, focus primarily on coordination of humanitarian actors within the province, as well as looking towards longer term activities including a desire to establish/expand a vocational training centre. Jobs and housing have been highlighted by government stakeholders as key areas of concern; linking to the city of Jalalabad's limited absorption capacity and lack of labour demand to keep up with the pace of returns. In both the short and longer term, the government stakeholders discussed with expressed concern the increasing population and the need to expand social services such as education and healthcare. Lack of documentation amongst IDP and returnee populations (both in terms of *Tazkira* and formal letters of guarantee to facilitate housing and employment) was also raised as a concern by the relevant Departments.

The response will also have to grapple with an anticipated 450,000 new conflict related displacements and up to 1 million additional returnees nationwide throughout 2017, according to projections in the 2017 Humanitarian Response Plan. If current patterns hold, this translates to a potential 25,000 conflict IDPs, 187,000 undocumented returnees, and 256,000 documented returnees to Nangarhar alone; the majority of whom will require some form of humanitarian assistance. Unknowns in the response include the degree of secondary displacement and forward movement away from Nangarhar once winter ends around March, the impact of the spring fighting season, and the degree of political push-factors from the Pakistan government for repatriation of Afghans to Afghanistan. Significant response risks are expected in terms of funding limitations, inability to negotiate secure access areas of severe need in the southern and eastern districts of Nangarhar, conflicts and disputes between new communities and hosts – especially if assistance is too little, too late, or poorly coordinated between agencies.

Section 2: Methodology



The Emergency Market Mapping and Analysis (EMMA) () process is a relatively rapid methodology used by humanitarian practitioners to assess market systems in emergency contexts. The methodology is intended to enable the mapping and analysis of key market systems that are, or potentially can, play a role in supporting the survival and recovery needs of a crisis affected population. The results of an EMMA can help agencies to design and implement emergency responses based on an understanding of local market systems, and to undertake interventions which in some fashion make use of, or support, these market systems to enhance delivery of assistance to target populations in need. EMMA is an iterative ten step process which moves from preliminary analysis to communication of results, including the following key analytical steps: market mapping, gap analysis, market analysis, and response analysis. Aligned to the principle of "do no harm" an EMMA should, at a minimum, support the delivery of assistance which meets humanitarian needs whilst not undermining or damaging existing market systems in ways which could hinder community or economic recovery. The EMMA methodology has been used in a variety of crisis contexts to examine food security, WASH, and shelter related markets in relation to survival needs, livelihoods protection and transitions to recovery. The basic methodology has also been adapted into a Pre-Crisis Market Analysis (PCMA) format for preparedness purposes.

2.1 Objectives of the Study

Oxfam's humanitarian programme is currently working in partnership with national partner organisations AHEAD and ADA to implement emergency food security & vulnerable livelihoods, and gender awareness and violence prevention interventions in Kunduz and Nangarhar provinces in response to conflict induced displacement and the Afghan returnee crisis. As part of its emergency response in Nangarhar province, Oxfam and its partners were interested to understand the impact of the crisis and influx of returnees on local markets in Jalalabad and throughout the districts. In order to inform how best to support the emergency needs of affected men, women, boys and girls, Oxfam set out to assess the performance and capacity of critical market systems to continue to supply survival goods and services to the most vulnerable families and communities in the province. It was therefore decided to adopt the EMMA methodology and apply this process to help clarify threats, risks and vulnerabilities to the market functionality, as well as identify potential new opportunities for affected populations to benefit from engaging with the market systems. It was also decided to use the data gathered throughout the EMMA process, and the analysis itself, to inform a scenario forecasting exercise given the likelihood of continued insecurity and return throughout 2017. Findings and recommendations are intended to support decisions on programme design, including the type and degree of cash transfer programming appropriate to the context, and opportunities for direct livelihood support and indirect market support. The study is also intended to identify thresholds and trigger points under which, according to response scenarios, one may expect market behaviour to be significantly altered.

The specific objectives were therefore to:

1. To understand the capacity of the labour and housing markets to absorb the additional supply of labour and demand for housing in light of the returnee influx and to identify and attempt to quantity any “gap”;

2. To map and understand the market system functionality, and capacity to contribute to meeting survival and livelihoods needs of families and communities in Nangarhar province vulnerable as a result of conflict, displacement, and forced return;

3. To draw out from the analysis a set of response recommendations on how to mitigate the likely obstacles and barriers to the target group accessing and satisfying critical income and housing needs, and to identify any opportunities to enhance or support the target groups’ use of these markets;

4. To use this analysis and learning process to inform and adjust Oxfam’s current and future humanitarian programming and to share this widely and advocate for other agencies and response stakeholders to also interpret and use this information as suits their individual mandates and capacity for intervention.

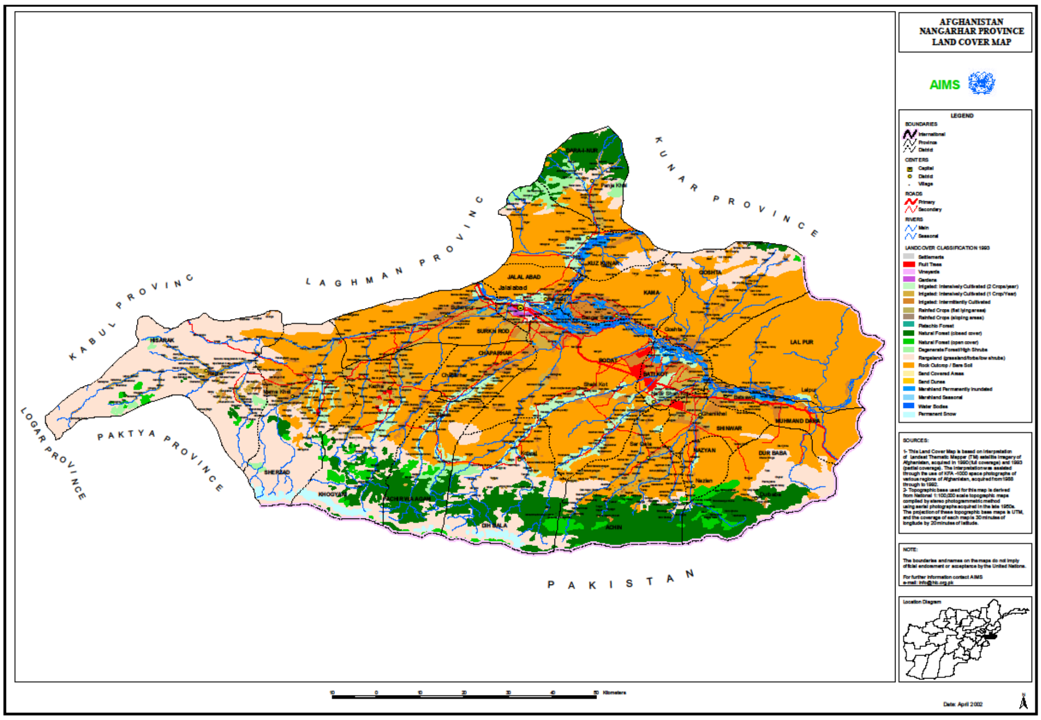
2.2 Geographical Focus

This study has focused on Nangarhar province, eastern Afghanistan in order to align with the focus of Oxfam and others humanitarian interventions in response to the 2016-2017 Afghan returnee crisis. This province has been the site of a few rapid assessments concerned with feasibility for cash transfer programming[26]and routine monitoring on overall market functionality, such as the market component of the 2016 Afghanistan Seasonal Food Security Assessment (SFSA) and monthly World Food Programme Vulnerability Analysis and Mapping Unit (WFP VAM) reporting on commodity pricing (which includes the Provincial Centre, Jalalabad). REACH has also recently released a detailed set of assessments of returnee and IDP conditions in informal settlements[27] throughout the Province, and a further livelihoods assessment is expected soon from NRC/Samuel Hall. However there has not, to date, been a comprehensive assessment of critical markets which includes a mapping and analysis approach, together with overall response recommendations; such as the EMMA methodology is intended for.

Image 1 – North eastern border map showing Nangarhar

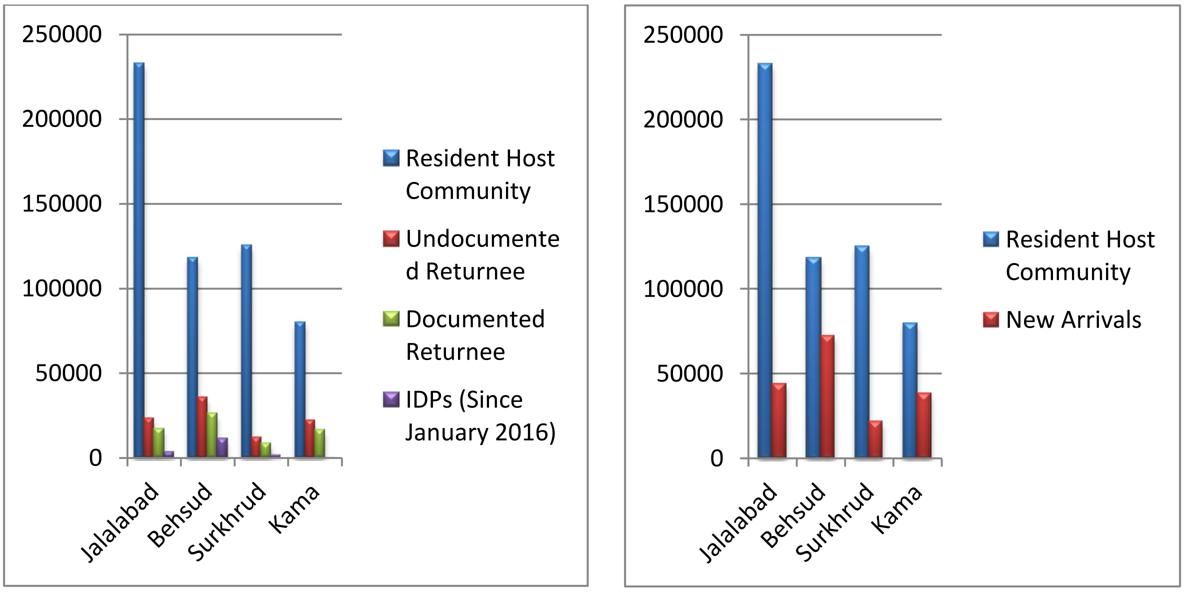
In addition to the identified assessment gap, Nangarhar has been selected due to the size of the influx (where the vast majority of returnees indicated an intention to reside in the province), the complexity of the crisis dynamics (with existing IDP communities and a number of AOG influencing access and conflict dynamics), and the large number of humanitarian actors present in the province commensurate to need (51 agencies according to the 2017 HRP). Geographically, sampling for the study has included the provincial market centre in Jalalabad where the majority of importers, wholesalers, and regulators are present, and the districts of Kama (A05), Behsud (A05), and Surkhrud (A04). These districts have been selected on the basis of highly concentrated influxes of returnees in these locations and they are the four most common intended destinations for undocumented returnees in the province. It is estimated that, as of January 2017, there was approximately 1 undocumented returnee household for every 10 resident / host households in Jalalabad, with the same ratio being 1 to 6 in Kama, 1 to 5 in Surkhrud, and only 1 to 4 in Behsud.[28]

Image 2 - Nangarhar province land use map



Districts nearby to Jalalabad; and in the North West of the province in general, are considered to be preferential areas of return. Though still fragile these districts are more secure in comparison to the highly volatile southern (A01) and sparsely populated eastern (A06) border districts. They also tend to offer relatively greater access to livelihoods opportunities given proximity to the major Kabul-Jalalabad-Peshawar highway and population centres residing nearby to irrigable land adjacent to the Kunar/Kabul river system. To be clear, the more remote Nangarhar border districts are also the location of qualitatively severe humanitarian need, and more should be done to negotiate secure access to the extent possible. However, as this is a market rather than needs assessment, the focus will be on the geographical areas containing the highest populations of our target group; and where markets have the potential to play the greatest role in the response.

Graph 2 - Sample districts: estimated host, IDP & undocumented returnee populations



2.2 The Process

The study process was initiated and lead by Oxfam, with support from AHEAD, from the 19th of February to the second week of April 2017. This data collection period was preceded by desk review of secondary resources and data, assessment planning, and the preparation of training materials by the EMMA leader. Participants and partner staff from Oxfam, IRC, AHEAD, Cordaid and Save the Children attended a three day training in Kabul to introduce the concepts of markets, market based programming, and the EMMA methodology. Built into this training were activities to define the target population, draft and refine the selection and initial mapping of critical markets, setting of key analytical questions, and an exercise to identify the key market actors and stakeholders from which the data collection phase would need to seek information. Following this "core" training, the EMMA lead finalised the data collection tools required for fieldwork while the EMMA co-lead worked with other members of the core team to finalise logistics, interview scheduling and timelines for data collection.

The field team, comprised of staff from the humanitarian, MEAL and logistics departments, then travelled to Nangarhar for a period of 13 days from late March to early April. Local field staff attended a two day training on the purpose, objectives and methodology of the EMMA and practical familiarisation with the data collection tools. Staff were then divided into four data collection teams, each lead by a member of the core team and assigned specific sets of actor interviews to cover. Data collection and analysis were conducted iteratively, with teams completing four days of data collection, pausing for a day of reflection and mapping, and then completing data collection. The resulting maps, notes and quantitative survey data were then entered into a database for analysis which, together with further discussion amongst the team in Kabul and reflection, formed the basis of this report. Finally, at the stage of preliminary results, the study team presented back to participants of the initial technical training, as well as the Food and Agricultural Cluster to share results and to seek feedback and critique.

To generate data for the analysis within this study, the researchers have spoken with 196 households, 16 local leaders (primarily Maliks), 68 employers, 15 labour contractors, 58 landlords (of rental houses, as well as those providing land or other forms of housing), and 21 private housing agents. Additionally, the study has drawn from Oxfam programme data to present a profile of the target group. This dataset includes needs surveys conducted with 2,052 undocumented returnee households, 280 IDP households, and 597 Host community households. For further details on data, and sample locations, see annex 1.

Section 3: Scope of the Assessment

3.1 Baseline Scenario

Across rural Nangarhar, there are several key livelihoods related patterns which can be drawn from the context. First, shifts in wheat pricing, the cost of daily labour, cross border relations with Pakistan, and conflict levels are common early warning indicators with impact across the four zones. Second, poor households rely overwhelmingly on wheat production and purchase, supplemented by small purchases of rice and maize and limited amounts of own livestock produce. It is telling that in all livelihoods zones poor households tend to produce less than half of their annual wheat requirement. Poor households are thus highly market exposed, and are also highly reliant on casual unskilled or low skilled labour, both on and off farm, for which payment is received either in cash or (in the case of dekhani sharecropping) through food commodities in kind. Migration can be a component of this labour, which in many aspects is highly seasonal in the rural areas.

Trade, livestock sales and taking non-agricultural products to market appear to be the preserve of better off households, who in turn do not tend to engage in casual labour. All livelihood zones are regarded as having reasonable to strong district, provincial and cross border market access, and proximity to transport infrastructure. According to the zoning, each livelihoods group accesses Jalalabad and Peshawar while the

Eastern Cross-Border Trade and Labour Zone is considered to additionally access Asabad and the Pakistani centres of Chatral, Bajawar, and Malmand. Lastly, the livelihoods zoning provides reason to suspect that the highest levels of livelihoods marginalisation and food insecurity are likely to be found (in a theoretical “baseline” year) along the Southern and Eastern borders of the province, directly adjacent to Pakistan (AF01 and AF06).

Table 1 - Nangarhar livelihoods zones summary:

Livelihoods Zone	Key Livelihoods Activities		Staple Foods and Sources		Key Income Sources		Early Warning Indicators
	Poor	Better off	Poor	Better Off	Poor	Better Off	
AF01 – Eastern Mixed Agriculture and Forest: considered at risk of chronic food insecurity when wheat prices drop (heavy reliance on market)	Grain and cash crop production, Livestock keeping	Forest product sales, Grain and cash crop production, Livestock keeping	Wheat 8-9 months purchase, 3-4 months own produce. Rice: purchase. Livestock products, own produce	Wheat: 6-7 months purchased, 5-6 months own produce. Rice, purchased. Livestock products: own produce. Beans: 1 month own produce	Agricultural labour, Livestock sales, crop sales	Forest product sales, livestock sales, crop sales	Food Price Spikes, Decrease in dry fruit prices, Afghan policy enforcement banning deforestation, Pakistan policy on food exports to Afghanistan
AF04 – Eastern Semi-Arid Agriculture: considered at little risk of chronic food insecurity	Labour (including dekhani), agricultural production	Agricultural production, Livestock husbandry, Trade	Wheat: 5 months own produce, 6 months dekhani, 1 month in kind. Vegetables: 7 months own produce. Livestock Products: 4 months own produce	Wheat: 7 months own production, 4-5 months purchase. Vegetables: 9 months own produce. Livestock Products: 4 months own produce	Migrant Labour, Agricultural labour, Crop sales	Trade, Crop sales, Livestock sales	Irrigation water availability, Decreasing wheat and maize prices, decrease in daily wages, conflict
AF05 – Eastern Intensive Irrigated Agriculture: considered generally food secure zone in chronic terms	Labour, Agricultural production	Agricultural production, Livestock Husbandry	Wheat: 5 months own production, 7 months in kind. Vegetables: 9 months own production. Maize, 2 months in kind. Livestock products: 4 months own production	Wheat: 7 months own produce, 5 months purchase. Vegetables: 9 months own produce, 3 months purchase. Maize: 2 months own produce. Rice: 3 months purchase. Livestock Products: 4 months own produce	Agricultural Labour, Vegetable sales. Off Farm Labour	Crop Sales, Trade, Livestock sales	Reduction in vegetable prices, Increase in river water volumes (flooding risk), crop diseases, conflict
AF06 – Eastern Cross-Border Trade and Labour: considered at risk of food insecurity in a bad year	Labour, Agricultural Production	Trade, Livestock husbandry, Agricultural production	Wheat: 3 months dekhani, 9 months purchase. Wild vegetables: 5 months collection. Maize: 3 months purchase. Livestock Produce: 4 months own produce	Wheat: 6 months own produce, 6 months purchase. Rice: 12 months purchase. Maize: 2 months purchase. Livestock Products: 6 months own produce	Migrant Labour, Local on and off farm labour	Trade, Livestock sales, formal employment	Climate performance, food price spikes, Restrictions on cross border trade, conflict

In urban and peri-urban Jalalabad agriculture and livestock sit alongside a more diverse set of economic activities; including trade, small scale manufacturing (especially labour intensive textiles) and construction. Livelihoods are heavily influenced by cross border migration and economic influences. Jalalabad is for instance the main conduit for Afghan onions to Pakistan and an estimated 9,000 MT/Year of Afghan almonds pass through the Torkham border crossing destined for Pakistani and Indian tables.[29] However, the further development of urban trade and manufacturing is hampered by limited education and skill levels. The Afghanistan male adult literacy rate is estimated at only 34.3% and the primary school completion rate is just over 50% (much less for women and certain ethnic groups).[30] National estimates indicate that more than 40% of the workforce remains unskilled and up to 90% of economic activity in Afghanistan occurs in the informal sector. Small (1-19 employees) to medium (20-99) enterprises consistently report political instability and corruption, and access to land, finance and electricity as the main obstacles in their business environment.[31] As a result, approximately 47% of the working population in Jalalabad consists of self-employed casual workers and another 38% can be categorised as day labourers – only 13% of the city's work force earns a salary.[32] For lower income households in Jalalabad, the three most common income sources are building construction, small scale retailing and driving (cars as well as rickshaws, often through a *Danda* arrangement).[33] In rural Nangarhar the population is spread across four livelihoods zones[34] (AF01, AF04, AF05, and AF06):

3.2 Target Population Characteristics

The target population is vulnerable host, returnee and IDP communities in Nangarhar province; in particular those reliant on income from casual labour and under significant economic stress while attempting to re-establish and maintain viable livelihoods and shelter solutions. To date, returnee and IDP populations have primarily being concentrated in Urban Jalalabad and nearby North Western Districts, especially Kama, Behsud, and Surkhrud (Livelihood Zones AF04 & AFO5). Due to the complex nature of these service markets, it is necessary to consider the overall populations within the Province. The total estimated population of Nangarhar Province, as of March 2017, stands at an estimated 1,961,448 people, roughly composed of:

Table 2 - Target group populations by sampled districts

Nangarhar (22 Districts)	Host Population (10% of households directly hosting displaced SFSA June 2016)	Undocumented Returnees	Documented Returnees	IDPs (Since January 2012)[35]
	1,545,448	159,00	116,000	41,483
Sampled Districts	Jalalabad City	Behsud	Surkhrud	Kama
Resident / Host Community – OCHA Projected	232,901	117,946	125,021	79,769
Recent Conflict IDPs (since Jan 2016 - OCHA)	3,438	11,108	1,429	70
Undocumented Returnees - OCHA	23,422	35,490	11,669	22,211
Documented Returnees (estimated ratio)	17,100	25,900	8,500	16,200

Whilst the table above presents the estimated population of each target group, the summary below subsequently presents a comparison of vulnerability data and needs analysis in order to understand the key current characteristics of each group. Although the EMMA is not intended to be a needs assessment and not all indicators are available for all groups, and not all data can be analysed in exactly the same manner, making use of recently collected Oxfam programme data makes it possible to better understand the target group profile. The different components of the target group, where it is reasonable to do so based on data quality and results, are presented separately to highlight differences. In other cases rougher approximations are more valid. It is important to note that when collecting data for selecting and verifying beneficiaries, Oxfam explicitly seeks to speak with the most vulnerable members of the community. This means that this profile should be understood not as representative of the population as a whole, but rather as a snapshot of vulnerable members within this population. This is ideal for the purposes of this report, as it aligns with the EMMA's target group, but it does mean that these data are not claimed or intended to represent all wealth groups. Finally, this data has been collected from February to March 2017 – and so it is a current profile, not a baseline.

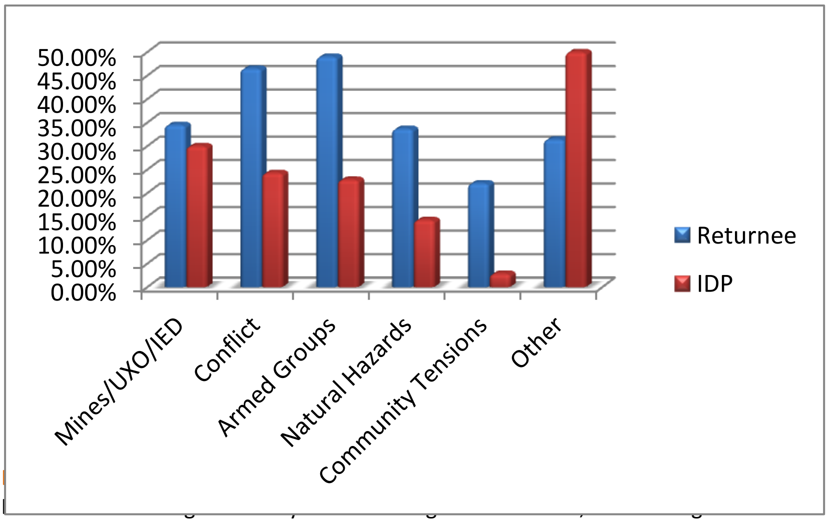
Demographic

The average reported household size for returnees is 6.6 persons, with IDPs and Host community households reporting 7.4 and 7.7 respectively. The prevalence of elderly headed households is high – between 20 to 30% for returnee and IDP households, though it is likely that the household "head" in this sense is being interpreted in a cultural and social sense, rather than being the member of the household most likely to be the main economic earner. The prevalence of child headed households is low, less than 3.4 percent, though an average of approximately 20% of households report more than 3 members under the age of 5. This is in line with Afghanistan's extremely young population. Female headed households are said to compose approximately 6% of the IDPs sampled, 13% of the host community and 22% of Returnee households. An explanation of the different rates isn't immediately obvious; though it's likely that lack of clarity around what constitutes a female headed household in the Afghanistan sense is a contributing factor to the variable responses. What might be considered female headed households will often rely on male relatives to perform vital social and economic functions on their behalf, and so there is a challenge to define this category with consistency. Approximately 10% of Returnee and IDP households report containing either a member who is affected by disability or chronic illness, while this rate amongst the host community is reported to be closer to 17%. In up to 5% of cases two household members are affected, and in less than 2% of cases 3 or more. Roughly 1 in 20 households reports experiencing mortality in the last six months, with a slightly higher rate among returnees. Lastly the household dependency ration (the number of children and the elderly requiring care in relation to the number of (theoretically) active adults able to provide it) varies between 2.5 and 3.

Displacement and return

The average returnee is estimated to have spent around 22 years residing primarily in Pakistan, with arrival dates back to Afghanistan primarily between July and November 2016 – reflecting cross border politics and the slow down over winter. The majority of IDPs report being displaced prior to mid-2016 and therefore it can be assumed the many were already in their current locations when the returnee influx began. Though it is important to understand the complexity of displacement and forced movement in Afghanistan where 76% of families experience some form of forced displacement in their lifetimes.[36] Across a history of several years or decades, categories are fluid, especially in Nangarhar. Many of the host community at some stage fled to Pakistan, many IDPs have been displaced, returned, and displaced again. Returnees categorised as refugees in Pakistan are well known to have repatriated to receive a set of benefits only to return to Pakistan (without official status). Across both the current IDP population and the returnees, there is a concentration of initial movement dates from 1983 to 1994, and again post 2010.

Graph 3 - Nature of returnee/IDP safety issues in current locations



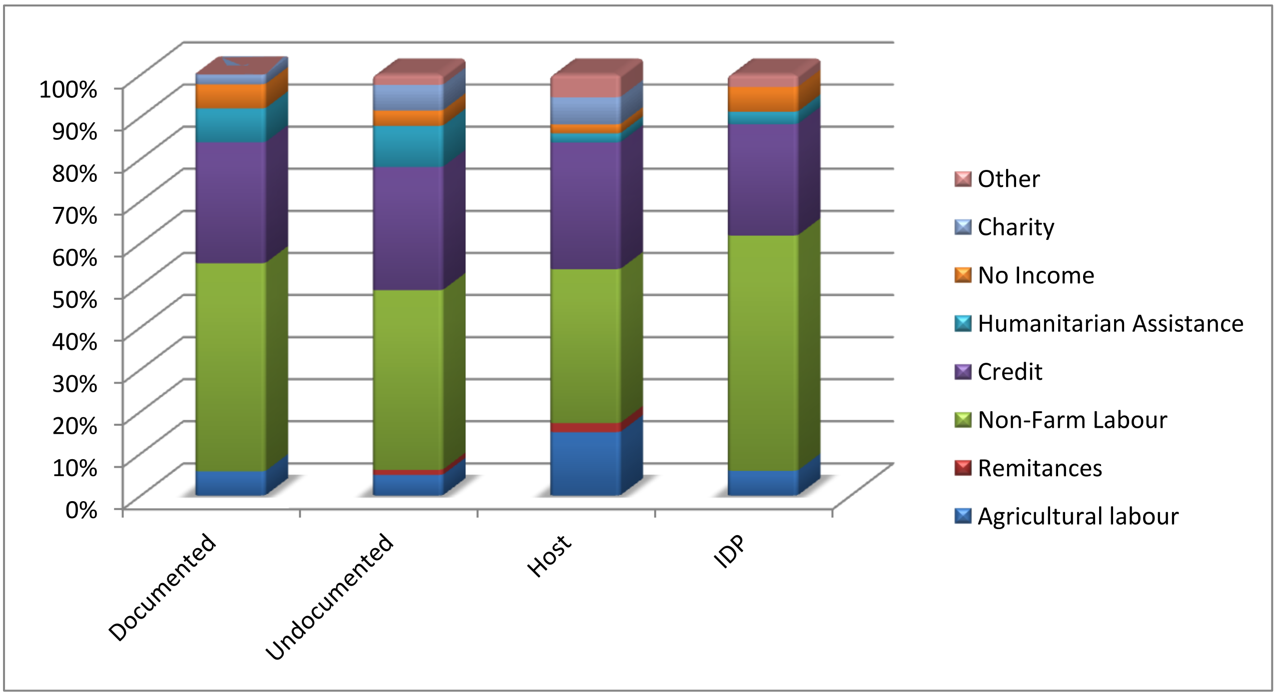
Returnee and IDP families almost exclusively report security as the main barrier for returning to their specific provinces and districts of origin and approximately 94% of families report that they intend to remain in their current locations, despite a number of listed hazards. However, an earlier socio-economic survey of Afghan refugees living in Pakistan[37] also records around half of refugee families not wanting to return to Afghanistan for livelihoods related reasons. In the current data, roughly 10% of returnees and 23% of IDPs also report that they have left family behind in the areas from which they have been displaced (either Pakistan, or for IDPs, most often the southern districts of Nangarhar). It is noticeable that despite the IDPs and returnees being sampled from the same locations, the returnee perception of specific security concerns is across the board much higher than that of the IDPs.

Economic security

The majority of vulnerable households in Nangarhar (across all categories) are highly reliant on various forms of casual labour, especially non-farm labour, to earn income and provide for basic survival needs. In line with the overall analysis of the livelihoods zones in Kama, Behsud and Surkhrud, as well as urban Jalalabad, agriculture and livestock play a lesser role among the most vulnerable households. Livestock ownership rates are approximately 12% among the host population; 9% and 6% among the returnee and IDP populations respectively. Access to agricultural land is similarly low, with 22% of the host community reporting some form of access, 12% of returnees, and less than 1% of IDPs. Only the host community reports significant earnings from agricultural labour (25% of households listing it as a main income source). Returnee and IDP populations only report 8 to 9% against the same. A five strategy food based Coping Strategies Index with the standards weighting shows little variation between the Host, Returnee, and IDP populations in terms of overall household stress with the average CSI score ranging between 19 and 23[4]. Access to markets is high with all groups reporting access to a market within average distances of 1.5 to 3km (15 to 20 minutes travel time); though EMMA related data also indicates that these markets are often basic commodity markets and lack specialised goods and services; including key trades people (different from urban Jalalabad).

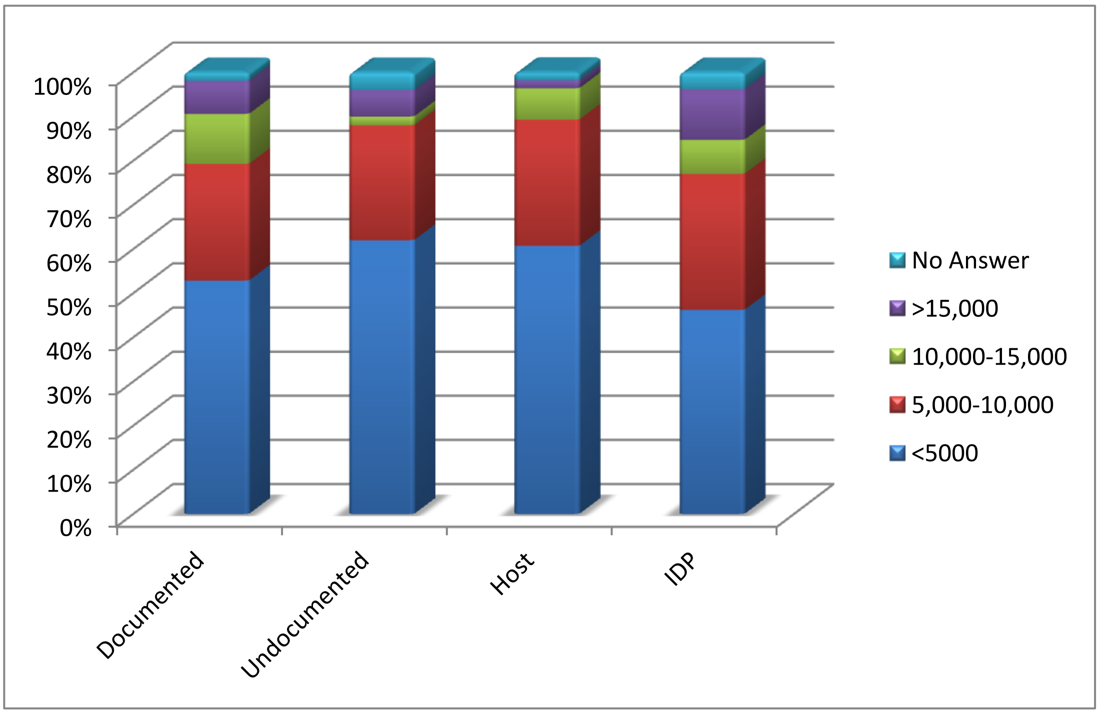
[4] The CSI is a way of measuring the frequency with which households, in a set number of most recent days, have had to resort to various types of "strategies" for managing when things get tough; for example, but reducing meal portions, sending younger children to work, or skipping meals altogether. Though most often food based, it can be seen as a measure of overall household economic stress.

Graph 4 - Main sources of income by type and frequency

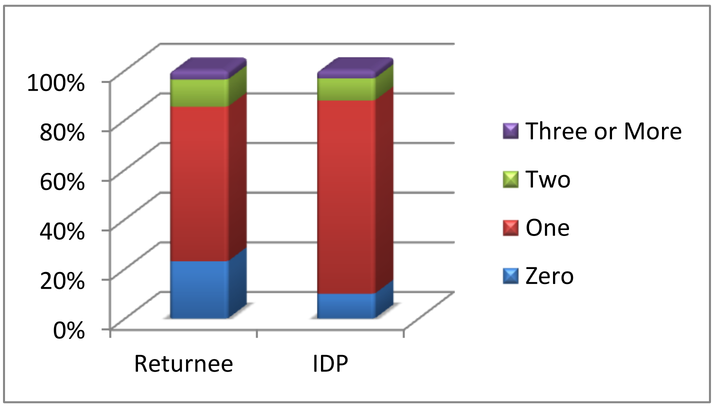


Overall 57% of households surveyed for the EMMA report earning less than 5,000 AFN (73.6 USD/67.7 EUR) per month. 28% report between 5,000 and 10,000 AFN of income, 7% between 10,000 and 15,000, and just 6% report earnings higher than 15,000 AFN (the remaining 2% declined to provide income information). For comparative purpose, estimates from 2013 show earnings among Afghan refugees in Pakistan of 19,000 AFN per household per month, on average. This means that a return to Afghanistan should be expected to have entailed a significant drop in overall income.

Graph 5 - Income distribution of target group

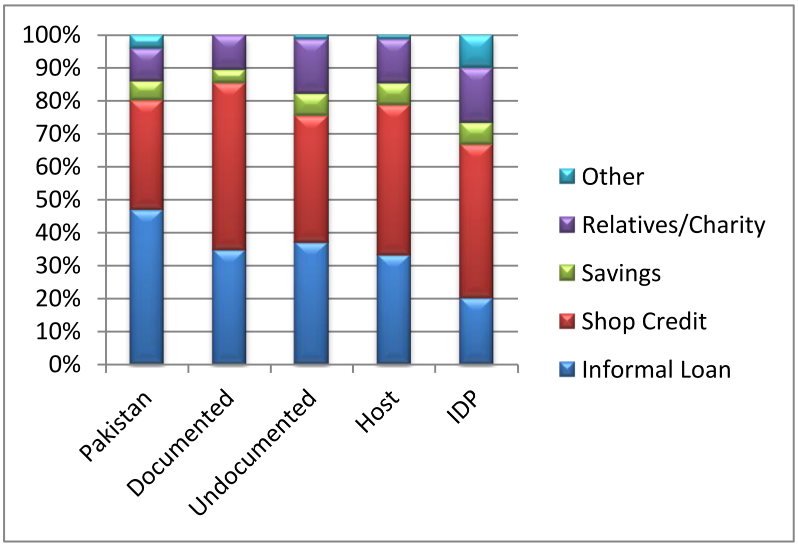


Graph 6 - Number of breadwinners in household



Among the host community, approximately 94% of households report that the head of the household is the only available breadwinner. The graph alongside shows a more detailed picture on earner patterns in IDP and returnee households. Oxfam programme data estimates that around 3% of household breadwinners are affected by a disability that prevents them from working, with an additional 3% affected by disability but retaining some ability to earn income. Among host community households 94% report that the household head is the only breadwinner, while among returnees an estimated 23% of households possess no breadwinner, 62% possess one, and 15% possess 2 or more. For IDPs households 10% report no breadwinner, 78% report one, and 12% report 2 or more. There are gender considerations to keep in mind with this data, and it is likely that women's economic contributions may often not be reported as "breadwinning".

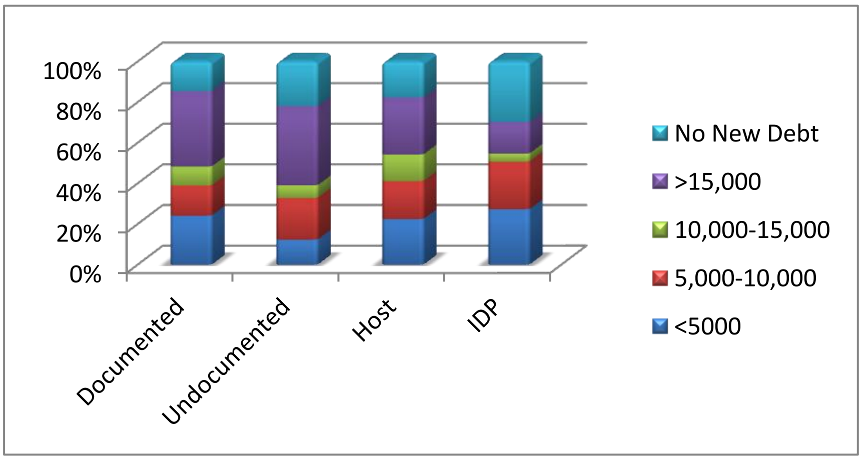
Graph 7 - Coping strategies employed when out of work



When out of work, the coping patterns are similar across groups with a high reliance on informal loans and shop credit, and around 20% of households are able to fall back onto savings, charity, or support from relatives. For comparison, the same data from a socio-economic survey of Afghan refugees residing in Pakistan is included[38], indicating a possible modest decrease in the capacity of returnees to access informal credit upon return to Afghanistan.

Graph 8 - Household debt levels

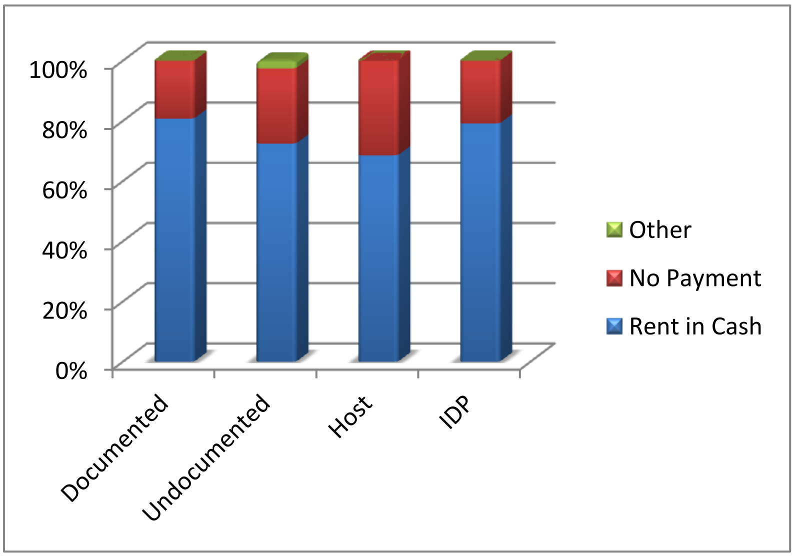
As would be suspected from the key coping strategies when out of work, debt levels are correspondingly high with a majority of households recently taking on new debt, and often carrying forward debt equivalent to two to three months of income.



Shelter and Water, Sanitation and Hygiene

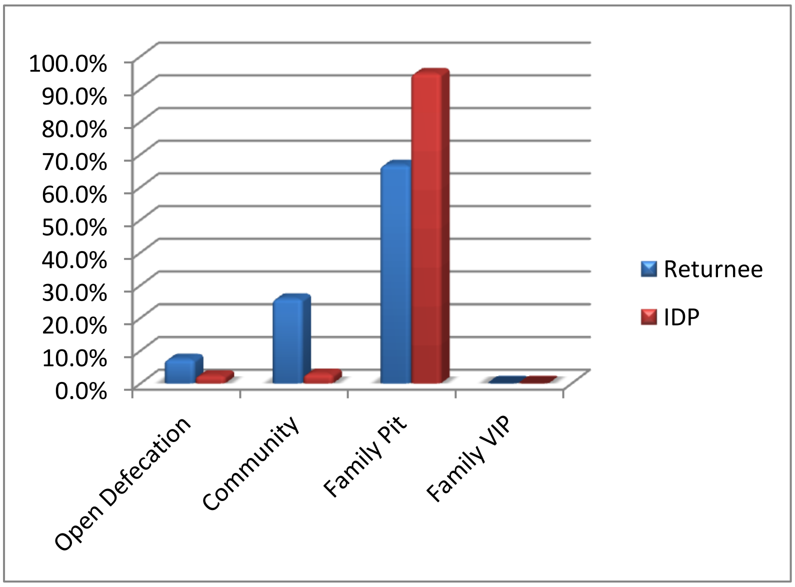
Roughly 3/4s of the target group reports paying some form of cash based rental in return for housing and accommodation, with the remaining not making any payment (either as the result of housing ownership or, often, hosting by close family). There were no reports of rent being paid as a defined in-kind contribution.

Graph 9 - Prevalence of payment for housing



Roughly 79% of returnees and 88% of IDPs report sufficient access to drinking water, with those who are unable to access enough (in quantity terms) citing limitations by host community (36% of returnees, 33% of IDPs), security issues (26% of returnees, 6% of IDPs) and physical constraints (35% of returnees, 10% of IDPs). Following a more general pattern, the returnees appear to be more concerned (or at least more likely to mention) safety and security related issues than IDPs, even though they are residing in the same areas.

Graph 10 - Latrine availability



Latrine availability is less than ideal, at 74% for returnees and 62% for IDPs. This is a significant WASH concern linking to the quality and sufficiency of housing available. Of those with access to a latrine, these are primarily family pit latrine, or in the case of returnees community latrines as well. There is an estimated open defecation rate of 7% among returnees and 2% among IDPs. Where latrines are available, they are generally reported to be safe, private and dignified (92% returnees, 95% IDPs).

3.3 Nangarhar Seasonal Calendar

There are three relevant seasonal calendars related to the studies target groups and locations; urban and peri-urban Jalalabad, the Eastern Semi-Arid Agriculture Zone (AO4) which contains Surkhrud district, and the Eastern Intensive Irrigated Agriculture Zone (A05) which contains Kama and Behsud districts.

Table 3 - Nangarhar seasonal calendar: Surkhrud (A04), and Kama & Behsud (A05): normal year

Weather Patterns	J	F	M	A	M	J	J	A	S	O	N	D
Peak Rains												
Winter												
Lean Season												
Cropping	**J**	**F**	**M**	**A**	**M**	**J**	**J**	**A**	**S**	**O**	**N**	**D**
Wheat					H					LP	P	
Maize						LP	P	W		H	H	
Vegetables			LP /P	W	W		H	H	H			
Vegetables 2 (A05)						LP	PL	W	H			
Vegetables 3 (A05)							LP	PL	W	H	H	
Opium				H	H					P	P	
Livestock	**J**	**F**	**M**	**A**	**M**	**J**	**J**	**A**	**S**	**O**	**N**	**D**
Milk Production												
Livestock Sales												
Wool/Skins												
Labour	**J**	**F**	**M**	**A**	**M**	**J**	**J**	**A**	**S**	**O**	**N**	**D**
Daily Labour – Agricultural												
Labour Migration (A04)												
Labour Migration (A05)												
Markets	**J**	**F**	**M**	**A**	**M**	**J**	**J**	**A**	**S**	**O**	**N**	**D**
Wheat Purchase												
Rice Purchase												
Oil Purchase												
Vegetable Purchase (A04)												
Peak Food Prices												
Wheat Seed/Fertiliser Purchase												
Other	**J**	**F**	**M**	**A**	**M**	**J**	**J**	**A**	**S**	**O**	**N**	**D**
Peak Flood Risk												
Peak Dry Spell/Drought Risk												
Livestock Diseases												
Crop Diseases												
Ramadan (2016)												
Key for Agricultural Activities	LP = Land Preparation			P = Planting			W = Weeding			H = Harvesting		

The seasonal calendar above shows the annual timeline for each of the key livelihoods activities, food purchases, hazards, and other relevant events, in a normal year, for the primarily rural communities residing in Surkhrud, Kama, and Behsud Districts of Nangarhar Province (Afghan Livelihoods Zones A04/A05).)[39] Where differences exist between the two livelihoods zones, these have been highlighted in yellow. This market assessment exercise has taken place in February/March; in the closing months of the lean season, where labour migration is expected to be at its peak, and just before the wheat harvest, and need to prepare agricultural land for re-planting brings back daily labour opportunities in local agriculture. In a number of Afghan cities with cold winters, including Kabul, Mazar-e- Sharif and Kunduz there is a trend towards seasonality in construction and certain other urban labour sectors. However urban and peri-urban Jalalabad possesses a much milder winter climate, and previous studies confirm that seasonality in urban labour is much less of an issue in this specific city[40].

Section 4: The Market Systems

4.1 Critical Market Systems Selection

A shortlist of potential critical markets was identified in the initial markets assessment terms of reference, and in further discussion with Oxfam and partner programme teams:

- Casual labour markets (skilled and unskilled, rural and urban);
- Urban and rural housing market (ownership, rent, hosting, temporary and unfinished structures);
- Market systems which facilitate access to land (purchase, rent, sharing arrangements);
- Essential commodities (wheat, oil, heating and winterization items, etc. – recognising that these are several markets with a potential degree of interdependence).

After further consultation with technical and field staff, fellow agencies and cluster leads, two critical market systems were selected for study: the **casual labour market** (income) and the **housing market** (supply) which reflects the current priorities of the affected population, the response and Oxfam and partners scope for intervention. Both market systems are seen as critical for meeting survival and livelihoods protection needs and the markets are of critical significance to the target groups. An IOM post return survey of undocumented returnees, conducted 10-45 days after arrival, shows that access to land and housing was the main challenge – cited by 38% of surveyed returnees. This was followed by unemployment at 30%, access to food at 18% and security at 9%[41]. This priority reflects qualitative evidence around pressure on key employment markets and the available housing stock in Nangarhar, with decreased wages and increased rents pushing vulnerable families into more remote areas distant from economic opportunities and basic services, as well as social infrastructure such as schools[42].

Seasonality affecting these two markets is complex. Various forms of labour can be expected to be more or less prominent throughout the year, with agricultural labour especially in demand in periods of staple and market crop land preparation and planting, and moderately in demand during harvest. Construction labour is steadier, and Jalalabad City's warm climate in particular means that the winter slowdowns experienced in other Afghanistan cities are not particularly marked.[43] There also exist a number of feasible response options in both of these markets related to modifications or new design approaches to Oxfam's existing portfolio of cash based interventions to meet both food security and multi-sector needs.

4.2 Key Analytical Questions

Key analytical questions for the assessment were finalised during the process of technical training and in consultation with members of Oxfam and partner teams, these questions were:

Labour:

1. How has the influx of returnees impacted the availability and wages of casual labour for vulnerable host, IDP and returnee communities?
2. What factors control, and what patterns exist, in how different target groups access different segments of the casual labour market?
3. Are there any growth sectors or new areas of labour demand / potential as a result of the returnee influx?

Housing:

1. How has the influx of returnees impacted on the availability and cost of housing for vulnerable host, IDP and returnee communities?

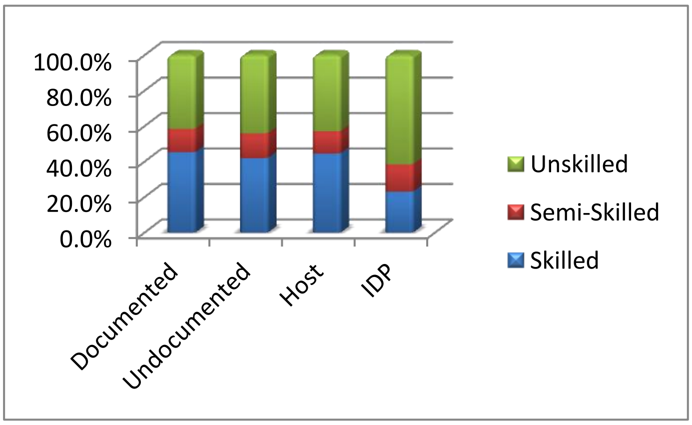
2. Which types (market segments) of sub-standard or temporary housing are, or are likely to be, utilised by vulnerable target group members?
3. How is access to housing negotiated by new arrivals, and do any groups experience discrimination or other forms of limited access?

Section 5: The Labour Market System

5.1 Skills Profile

The overall composition of skills available on the labour market in Nangarhar is dominated by shop-keeping, transport/driving, agriculture (farming) and livestock husbandry.[5] The labour market is fairly evenly divided between workers of various skill levels as per the graph below (with IDP households seeming to be slightly less likely to possess a defined labour related skill). However only 65% of skilled and semi-skilled households surveyed reported being able to generate income from these specific skills in the last six months. In terms of the Afghanistan context this reflects a wider trend of challenges to match skill needs to training, and as well to employability and to demand. In the context of returnees this also points towards a likely severe "down-skilling" of the group, whereby skills remain unutilised as returnees seek unskilled labour as a result of either limited demand or a limited ability to connect their skills with employers (likely related to a lack of family and social networks).

Graph 11 - Skill level of households by target group category

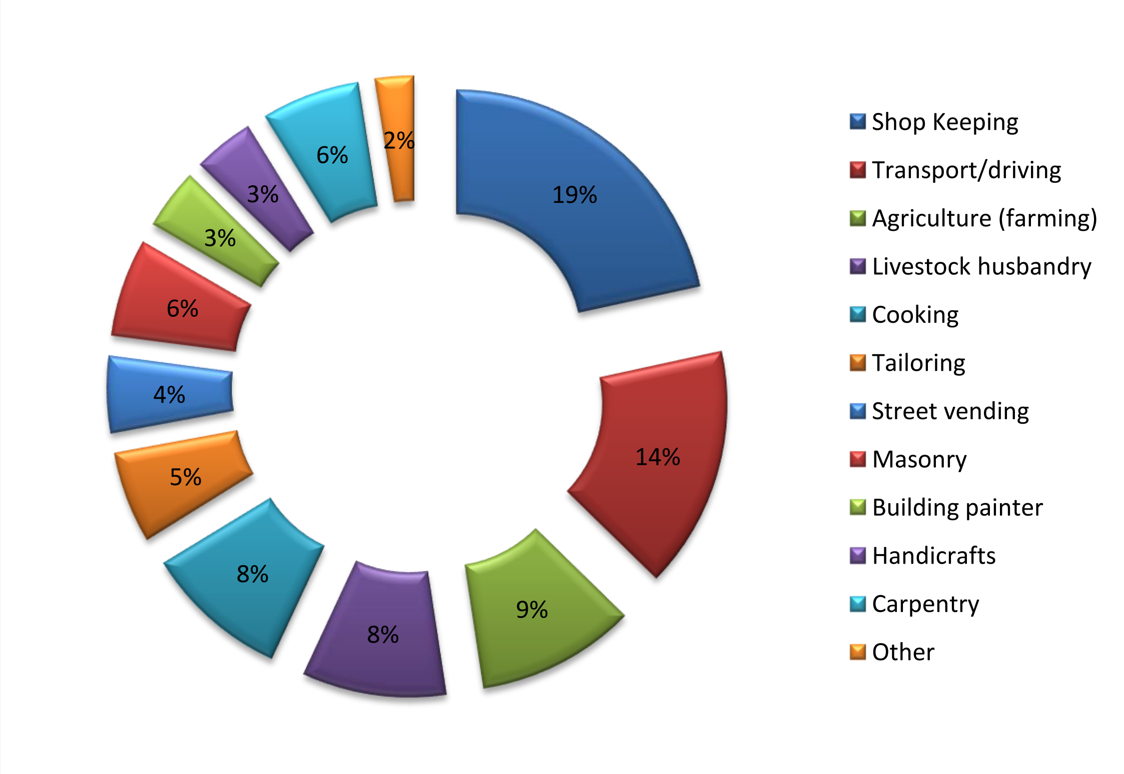


Similar to many areas of Afghanistan there is a skills gap in the areas of skilled trades (especially carpentry and painting, and to a lesser degree tailoring, mechanics, and masonry). And though more than half of employers (57%) indicate that they are providing some form of on the job training, these positions seem to come most often to family and social connections and often involve periods of severely reduced wages. This informal training is not necessarily an issue in itself. However the lack of a comparable and sufficiently accessible formalised training sector for skilled trades in areas of most highest demand (irrespective of family and social ties) does create a likely series of bottlenecks in terms of increasing the availability of those skills which are most in demand. Previous studies of technical training and livelihoods development work in Afghanistan have suggested that a six month qualification with formal certification, and resources dedicated to supporting job seeking and on the job training should be worked towards as a standard

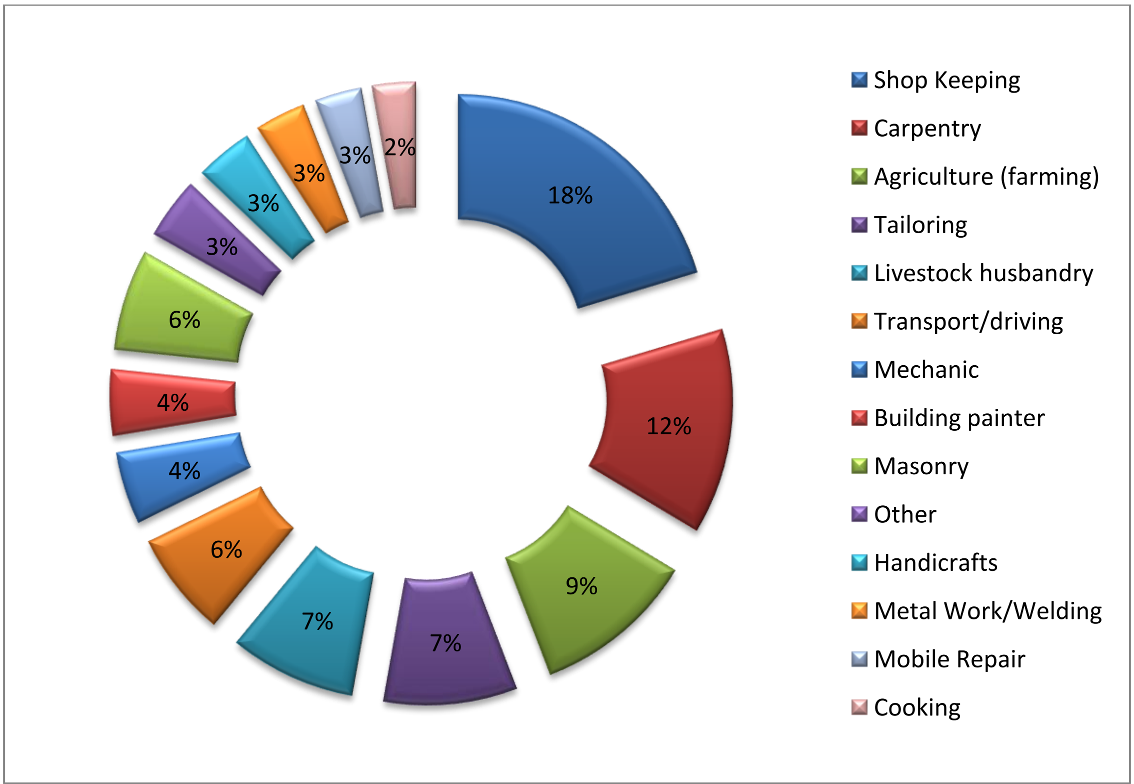
5 This is the skill availability in terms of the percentage of household who report having these skills in March 2017; this is not a statement of how much these skills are used or employed to contribute to income.

level of quality in these interventions. The results support this recommendation in light of the returnee influx and Nangarhar in particular.

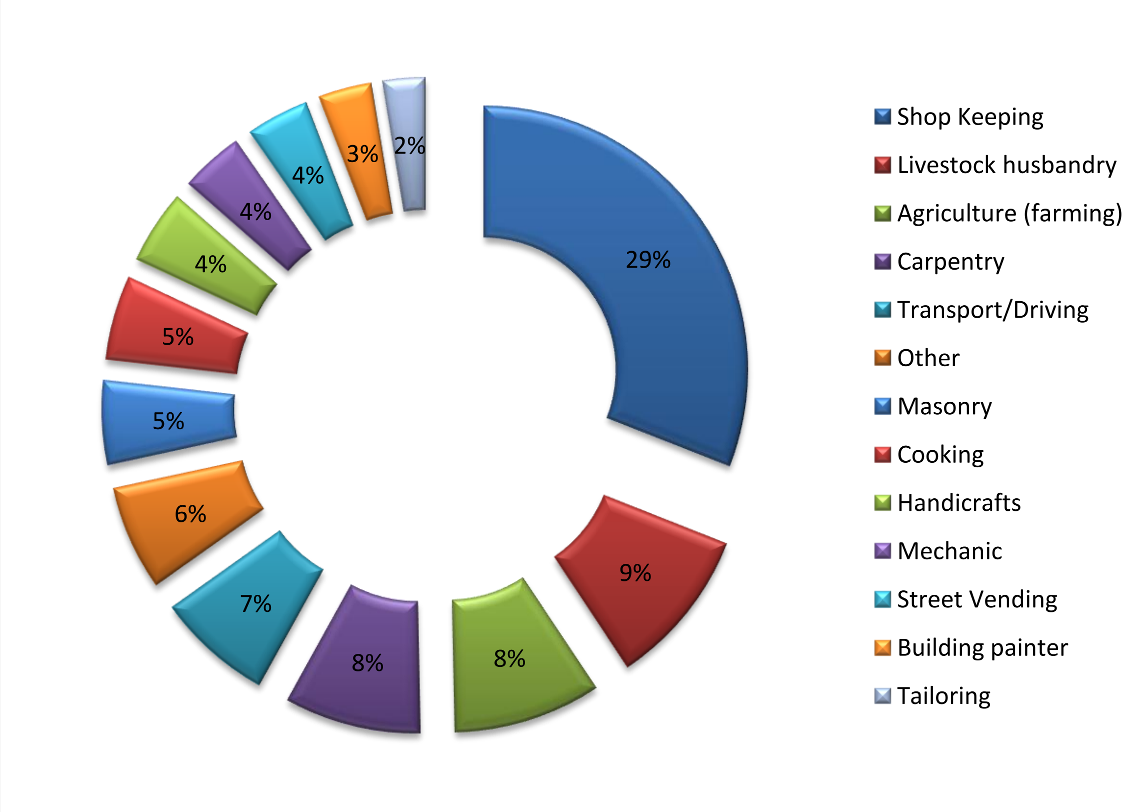
Graph 12 - Skills possessed: host, returnee and IDP



Graph 13 - Skills perceived to be profitable: host, returnee, and IDP



Graph 14 - Skills perceived to be profitable: host, returnee, and IDP - Women



The table below categorises the top ten skills mentioned as possessed by each category of households within the target groups. It also records the top ten skills mentioned as profitable in the local areas of those households encountered during EMMA fieldwork. For a detailed separate breakdown of results by host, IDP and returnee respondents please refer to the additional annexes.

Table 4 - Skill possession and perceptions of profitability: disaggregated by displacement category

	Top Skills Possessed	Top Skills Perceived Profitable
Overall	1. Shop-keeping	1. Shop-keeping
	2. Transport/Driving	2. Carpentry
	3. Agriculture (Farming)	3. Agriculture
	4. Livestock	4. Tailoring
	5. Cooking	5. Livestock Husbandry
	6. Tailoring	6. Transport/driving
	7. Street Vending	7. Mechanic
	8. Masonry	8. Building Painter
	9. Building Painter	9. Masonry
	10. Handicrafts	10. Other skills not specified
Host	1. Agriculture (Farming)	1. Shop-keeping
	2. Shop-keeping	2. Carpentry
	3. Transport/Driving	3. Tailoring
	4. Cooking	4. Other skills not specified
	5. Building Painter	5. Agriculture (Farming)
	6. Street Vending	6. Transport/Driving
	7. Other	7. Building Painter
	8. Livestock Husbandry	8. Street Vending
	9. Tailoring	9. Livestock Husbandry
	10. Handicrafts	10. Mechanic

Returnee	1. Shop-keeping 2. Transport/driving 3. Cooking 4. Tailoring 5. Agriculture (Farming) 6. Masonry 7. Street Vending 8. Handicrafts 9. Carpentry 10. Building Painter	1. Shop-keeping 2. Carpentry 3. Agriculture (farming) 4. Tailoring 5. Transport/Driving 6. Livestock Husbandry 7. Masonry 8. Mechanic 9. Handicrafts 10. Mobile Repair
IDP	1. Livestock husbandry 2. Shop-keeping 3. Cooking 4. Agriculture (Farming) 5. Masonry 6. Street Vendor 7. Building Painter 8. Community Worker 9. Barber 10. Solar System Fitting	1. Shop-keeping 2. Livestock Husbandry 3. Agriculture 4. Carpentry 5. Tailoring 6. Building Painter 7. Transport/Driving 8. Masonry 9. Mechanic 10. Mobile Repair

An analysis of this table, together with qualitative information from employers, labour contractors and community leaders, allows us to broadly categorise skills into the following three categories.

Skills for which there is a presence of both demand and supply: There is both a demand for, and a supply of, labour using skills related to shop-keeping, agricultural production (farming), livestock husbandry, and transportation/driving. These skill sets relate to key skill sets observed amongst the different sections of the target group prior to March 2016, with the host community being more familiar with agriculture, IDPs with transport/driving and animal husbandry, and the returnee population having adapted to livelihoods focused on small scale shop keeping, transport and cross border trade. To some extent there is also an availability of, and demand for, agricultural skills (among the host community) and livestock husbandry (among the IDPs). However these skill sets both require complex negotiations around land and resource access (which appears to be the primary constraint to expansion).

Skills for which there is a limited supply compared to demand: For a limited number of skills, primarily carpentry, building painting, and to a lesser degree tailoring, mechanics, and masonry, there does appear to be a genuine skills gap whereby there is a degree of unmet demand for these skills within the province. These skills may be possible to address through typical TVET interventions *if* the training is formalised and of quality, at least 6 months of training, and sufficient resources are dedicated to overcoming the post-qualification employment barriers related to information and network access.

Skills for which the supply overwhelms the demand, or are perceived as un-profitable: A total of 40 skills were included in the questionnaire structure, for those skills which received negative responses (i.e did not make the top ten according to any households within the target group, or receive a note-worthy mention from employers and contractors) please refer to the skill reference table in the annex.

5.2 Reference Market: market chain, environment, and infrastructure

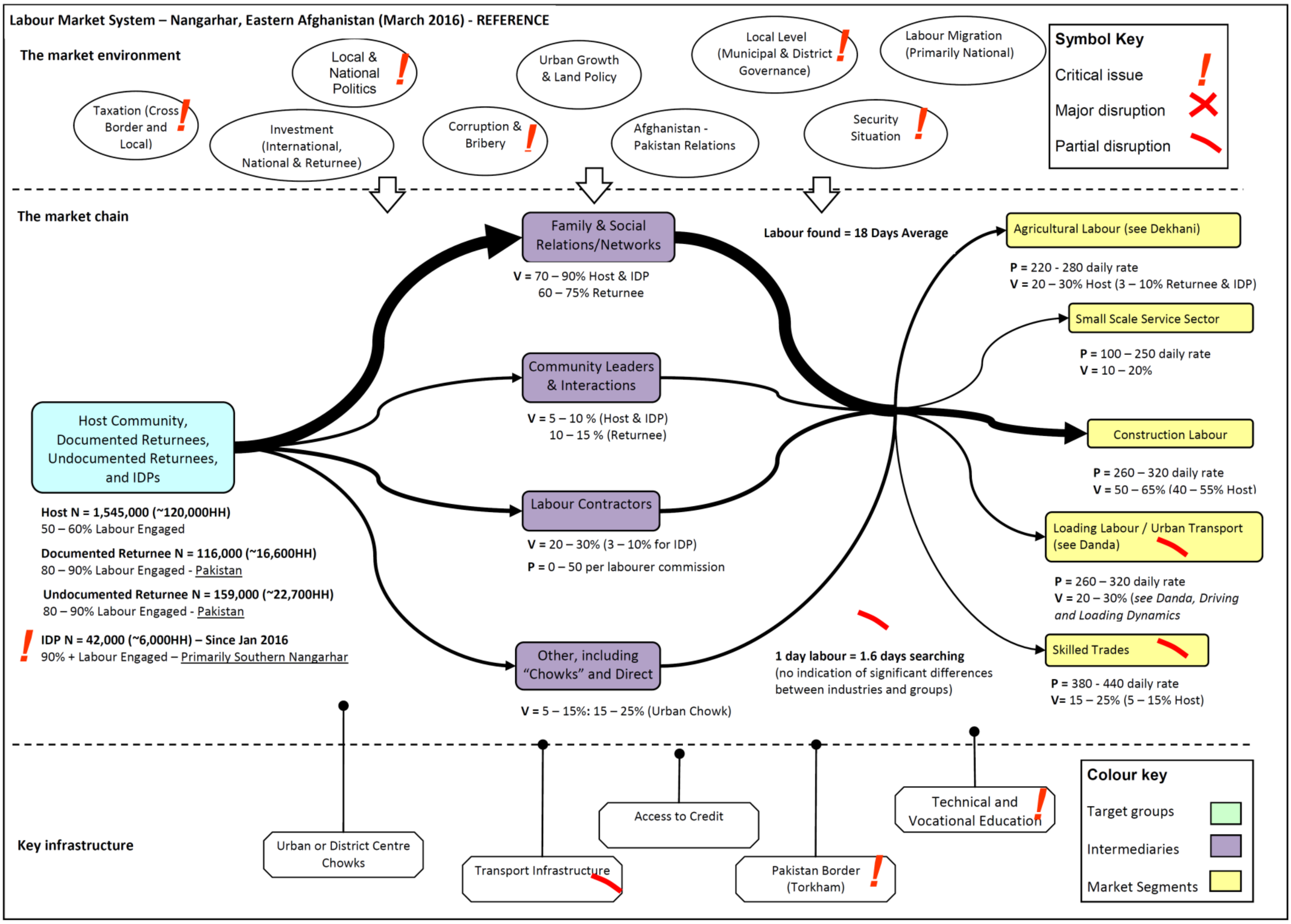


Illustration 1 - Labour market system – reference map (March 2016)

Market chain

In March 2016 the market began with the target group of vulnerable host, returnee and IDP communities selling their labour primarily in locations of residence in north western Nangarhar, Pakistan, and southern Nangarhar respectively. For more than 80% of returnees and IDPs casual labour provided a major contribution in terms of income to their livelihoods, for the host community this rate was (and is) significantly lower, but still a major livelihoods source. The critical issue around IDPs in the reference situation relates to the challenges of measuring IDP movements, and of setting an arbitrary date for what constitutes a "recent" IDP and at what stage, if ever, an IDP family can be more accurately characterised as a resident of their new location. The vast majority of respondents reported seeking work full time for the month of March in 2016, with an average of 18 days found (with no indications of significant differences between groups and industries). This represents a rate of return of 1 day of labour per 1.6 days of seeking, or being available for, labour. This less than ideal relation between desire for work and the finding of work is already a pre-existing partial disruption of the market. Part of the challenge in finding work is likely related to the criticality of family and social relations/networks for job seeking. More than 70% of host and IDP communities rely on these networks for seeking work, slightly less for the returnees (who at this stage where in Pakistan). To a much lesser extent, community leaders, private contractors, and open job seeking at public spaces, or squares known as *chowks* were also utilised. In terms of observations and qualitatively it appears likely that these other job seeking methods are less effective, and require more days of seeking work per day found, than family and social networks.

There are five key labour industries, or “segments”, to which our target group is selling their labour; agricultural, small scale service sector, construction labour, loading labour and urban transport, and skilled trades (primarily vocational trades, and in many cases related to demand for residential and commercial building, as well as infrastructure works). In addition to the market intermediaries, skill possession and a variety of factors mapped above, it is also safe to assume that basic literacy and numeracy plays a role in facilitating access to various labour segments.

Agricultural labour is primarily relevant to the host community and relatively negligible for the IDP and returnee communities. IDPs from the southern districts are coming from livelihood zones primarily dominated by livestock, small scale forestry, and cross border trade – only doing agricultural labour for wealthier members of the community occasionally. For returnees, restrictions on land access in Pakistan account for a change in livelihoods strategies. The daily wage in March 2016 is estimated at 220 – 280 AFN (3.2 USD/3 EUR – 4.1 USD/3.8 EUR) . There is relatively less quantitative data around the small scale service sector as this segment contains a number of widely diverse activities from hospitality to car washing. It is the least prominent of the five industries for our target group and the estimated daily wage in March 2016 was 100 – 250 AFN (1.5 USD/1.3 EUR – 3.7 USD/3.4 EUR) per day. Construction labour is the most widely engaged in industry across all of the host, returnee and IDP communities. Prior to the returnee influx the construction sector in Jalalabad was already being driven by a rapid growth rate, and urbanisation in Jalalabad and nearby districts (especially Behsud). The city’s position between Kabul and Peshawar, transport links, and the presence of a large population of cross border enterprises has meant sustained growth in recent years. The daily wage for construction labour in March 2016 is estimated at 260 – 320 AFN (3.8 USD/3.5 EUR – 4.7 USD/4.3 EUR) per day.

The loading labour and urban transport segment covers the practices both of the literal un/loading and movement of goods, and of those from the target group who operate motorised rickshaws and more rarely other vehicles in the urban setting. Similar to construction labour, the estimated daily wage is 260 – 320 AFN. In Jalalabad loading labour is often organised through groups from several to a few dozen labourers who work together under the informal leadership of a contact point who manages relationships with transporters and businesses. This leader assigns labour and runs the allocation. Transport is more often engaged by returnees operating rickshaws, at this point in time, on the Pakistan side of the border and especially in urban Peshawar. Lastly, skilled trade covers a range of activities, from tailoring, carpentry, masonry, painting, electricians, barbering, handicrafts etc., though the vast majority of skilled tradesmen encountered worked either in a service area such as tailoring, or in skilled trades related to the construction industry. The estimated daily rate in the reference map is 380 – 440 AFN (5.6 USD/5.1 EUR – 6.5 USD/6 EUR).

Two further practices referenced in the market chain require explanation. **Dekhani** is a form of labour/sharecropping whereby a poor household provides labour, while a better off household provides land and farming inputs for agricultural production. In return for labour the poorer household will receive 1/3 to 1/2 of the harvest (an arrangement most common to wheat production). This arrangement is almost entirely limited to being a relationship between better off and less well off host community households in the sampled districts. **Danda** is the practice a renting a productive asset (often a vehicle or rickshaw) for a fixed daily rate and then running this asset in an attempt to make a profit above the fixed rate owed to the owner.

Market environment

The market environment before the returnee influx is essentially dominated by three factors; security, provincial and local governance, and the relationship with Pakistan and subsequent effects on border access. As discussed in earlier sections, the security situation in Nangarhar is precarious. In addition to ongoing fighting between the Afghanistan National Army (ANA) and various armed opposition groups, there is occasional cross border shelling from Pakistan, and Daesh also has a presence in the southern portions of the province. This has a serious impact on the overall macro-economic performance of the Province in terms of market access, transportation, willing to invest etc. There is also a large amount of activity in terms of illicit opium poppy cultivation in Nangarhar, the impacts of which on labour are ambiguous. Also impacting the labour market is the relationship with Pakistan in terms of migration between Afghanistan and Pakistan (which influences labour availability), the movement of people and goods across the border, and also the taxation structure, which tends to highly tax imported goods. These policies are complex and exert a degree of control over the level of economic activity and therefore demand for labour in the Province. Finally, although not a form of casual labour, recruitment into the security forces is an important source of income for younger men in the province and may account – in part – for the high rate of families reporting a member who has moved away to earn income.

Market infrastructure

Critical market infrastructure prior to the crisis includes transportation infrastructure, credit access, access to the physical border crossing itself, technical and vocational education and the public spaces or *chowks* in which labour congregates. Limitations in transport infrastructure affect the movement of labour and there is a longstanding tension between access to labour (which is concentrated in the urban and peri-urban areas) and the costs of housing and living, including transport. There is also a lack of accessible training institutions for technical and vocational education, however, and although this is in one sense a bricks and mortar infrastructure issue, there are also social and cultural limitations to skills and job market access that mean expansion in TVET education (if it is to reduce the skills gap meaningfully) is about much more than the availability of training centres.

5.3 Emergency Affected Situation: disruptions & critical Issues, status of market supply and demand, market access and power

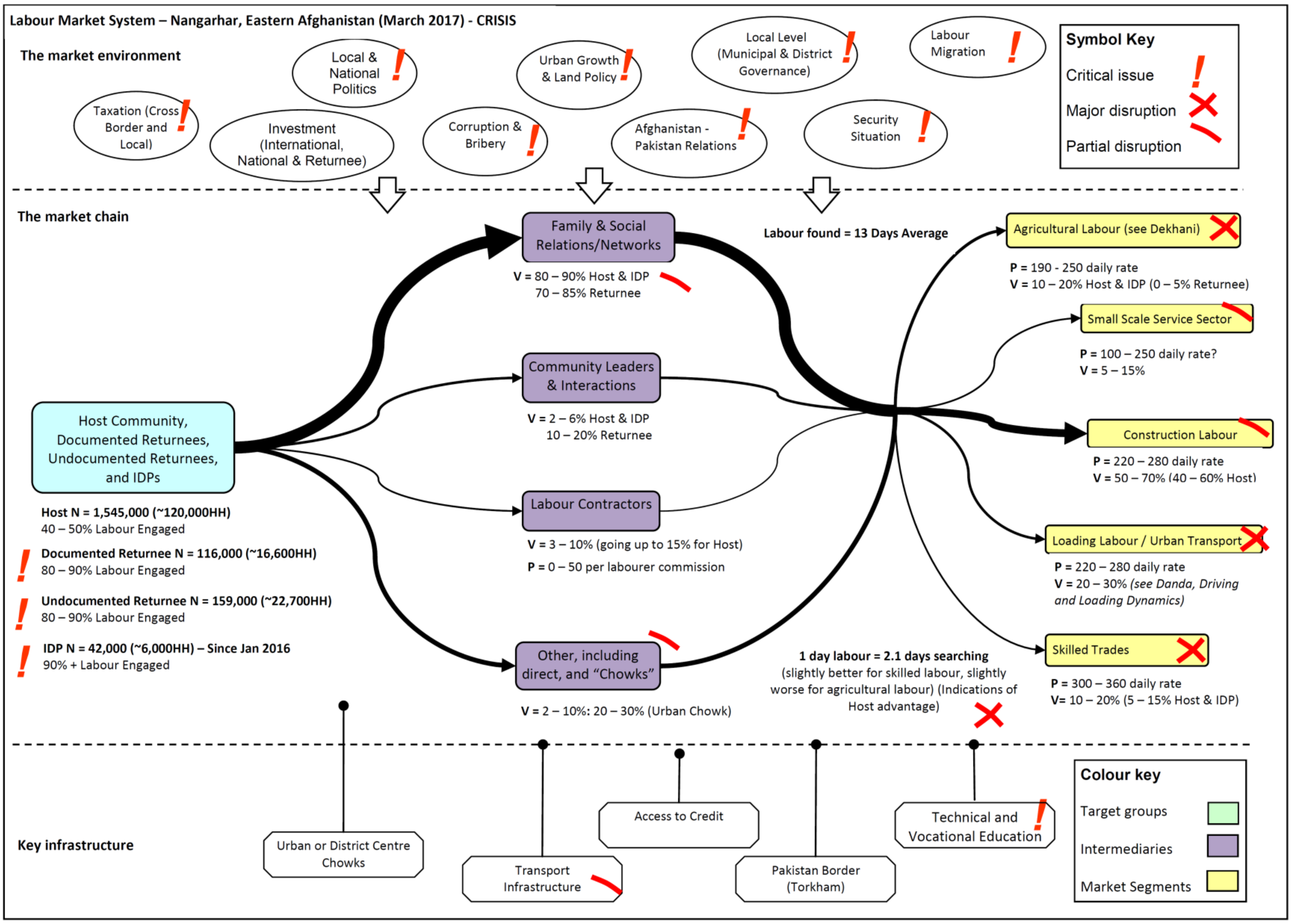


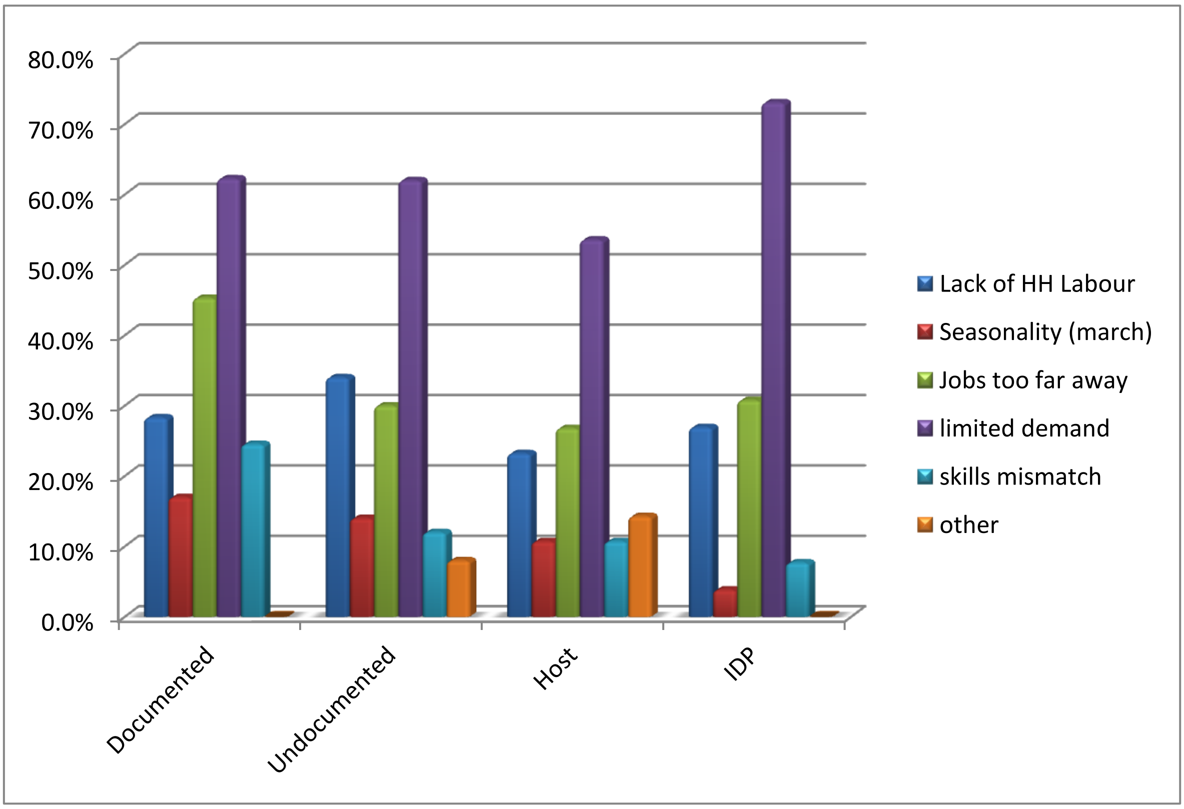
Illustration 2 - Labour market system – crisis affected map (March 2017)

Market chain

The returnee influx has not caused the overall structure of the market chain to alter in terms of introducing major new relations or pathways. The crisis has instead placed the existing structures under an extremely high degree of stress by introducing a new supply of labour in the form of returnees, and to a numerically lesser extent IDPs. There are a number of slight changes in job seeking behaviour, in line with what one might expect in a displacement and return situation. The returnees have become more reliant on community leaders than they were in Pakistan, as well as on family and social networks – which has become even more dominant as the primary means by which jobs are negotiated and found. There are also indications that more people are using the chowks and similar public spaces for open jobs-seeking. In essence, one can say that there is a disruption as returnees fall back onto more limited networks and try to re-establish the largely labour based livelihoods experienced previously in Pakistan.

Agricultural labour remains largely the preserve of the host community, and returnee participation has dropped even further from the levels experienced when residing in Pakistan. Participation in the construction segment appears to have increased slightly in terms of the proportion of households active in this form of labour. The loading labour segment, due to the informal but organised system connecting transporters and groups of labourers, is conducted primarily by the host communities (who have the established contacts). In contrast, running motorised rickshaws and other people transport services appears to be much more concentrated in the hands of the returnees, who bring this skill-set and livelihoods familiarity from Pakistan, and the IDPs who have adapted to income generation in an urban context. A final significant change is a decrease in participation in skilled trades, largely as a result of increased supply and competition forcing some labourers into lower skilled activities. Daily wages have dropped across the board as a result of the influx of supply, and while interviews with employers suggest that demand has likely experienced a modest increase (especially in the construction and skilled trades sectors), it has simply been outpaced. As a result daily wages now stand at 190 – 250 AFN (2.8 USD/2.6 EUR – 3.7 USD/3.4 EUR)for agricultural labour, 220 – 280 AFN (3.2 USD/3 EUR – 4.1 USD/3.8 EUR) for construction, a similar range for loading and transport, and 300 – 360 AFN (4.4 USD/4 EUR – 5.3 USD/4.9 EUR) for skilled labour. Data limitations (and the vast breadth of activities under the small scale services sector create a challenge to accurately measure the impact in this minor segment).

Graph 15 - Perceived barriers to further income from labour



Across the four sections of the target group the greatest perceived barrier to taking further income from this new, crisis affected, market chain was the limited demand in relation to supply (post-returnee influx). Following this, all but the undocumented returnees report that the distance of job opportunities from their places of residence is the second most critical barrier. Third (or second for the undocumented group), is the issue of a lack in household labour – by which we mean that the household doesn't possess more members with either the time or capacity to engage in more income earning labour activities.

Overall, in analysing this market chain we can say that the situation is consistent with a large influx of new labour supply which has overwhelmed demand for labour across all five key industries even if certain of those industries (especially construction) are likely to have experienced some growth in demand. This has resulted in less labour availability per household and downward pressure on daily wages; affecting all categories of households. We also see indications, especially of returnees, occupying lower skilled occupations than previously – almost certainly due to highly increased competition for skilled employment (anecdotally the returnees from Pakistan are widely regarded as being more highly skilled in almost all areas, with the exception of agriculture and livestock husbandry).

Market environment

The market environment has become increasingly complex and limited following the returnee influx. Security issues remain severe, as do corruption and bribery charges, which touch most industries and impact the flow of labour demand. Labour migration rates remain high, and of the households interviewed between 45 – 65% report at least one household member was away for more than 2 weeks at a time to seek or perform labour. Of those households reporting labour migration approximately 74% of migration was elsewhere in Afghanistan, 18% within Nangarhar, and 9% international. As the 'barriers to income' graph shown above highlights, urban growth and development policies which influence transportation and affordability of localised economic opportunities are increasingly important. Local municipalities, district officials and government departments such as Labour and Social Affairs; Information and Culture; Refugees and Repatriations; and the Rural Rehabilitation and Development are key stakeholders here. As yet, there is surprisingly little evidence of active discrimination on the basis of displacement category, though the reverse side of reliance on family and social connections to find jobs is in essence form of discrimination against those outside of family, social and at times ethnic/tribal networks. Employers, local leaders and host community households routinely responded to questions probing for evidence of discrimination by stating that returnees are Afghans who require support and who can contribute to "building" their village/city/region.

Market infrastructure

The market infrastructure is, in some ways, the least crisis affected component of the labour market system. A number of issues and concerns, for example the high cost and low quality of transportation infrastructure remain similar to the reference situation. However key changes do include the effect of heightened Afghanistan – Pakistan tensions on the Torkham border, the closure of which from mid-February to late-March 2017 is reported to have a number of knock on economic effects reducing demand for construction and loading labour especially. The influx of returnees and challenges in finding work within the existing labour market has also created pressure to increase the availability of institutions for formal technical and vocational training. This is completely understandable, but it is worth noting that alongside actual skills possession, the heavily network reliant system for jobs seeking is also itself a key barrier to linking skills to employers. Technical and vocational education must then be accompanied by parallel support in this area.

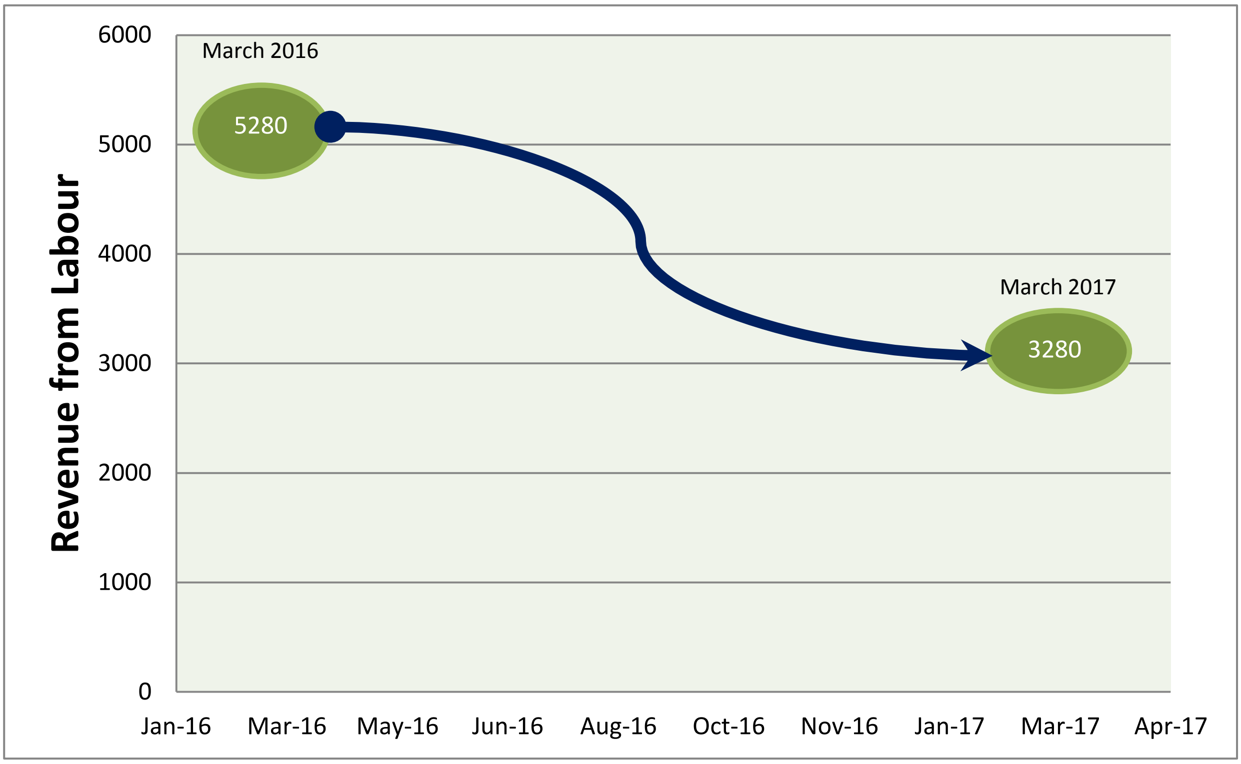
5.4 Labour Gap Analysis

1) Gap in access to labour

Among the labourers interviewed, there has been a drop in access to labour from an average of 18 days in March 2016 to 13 days in March 2017 (a 35-40% decrease). This drop has been experienced relatively uniformly across all categories of the target population and sectors (within the limits of the data to distinguish). Since time available and desire to seek labour have remained steady, this represents a drop from 1 day of labour found per every 1.6 days of seeking, to 1 day found per every 2.1 days seeking. From the qualitative observations shared by employers and contractors, it is highly likely that aggregate demand for labour is actually remaining steady, or improving. Thus, this drop in access to labour could be primarily a result of the influx of new supply creating higher competition and dividing the available demand.

2) Gap in Revenue from Labour

The average reported monthly earnings from labour – calculated at a weighted daily rate across the key industries and taking into account days of labour per month – has fallen from 5,280 AFN (77.7 USD/71.4 EUR) in March 2016 to 3,280 AFN (48.2 USD/44.4 EUR) in 2017. This is also a 35-40% decrease. The implications of this income gap are substantial, especially as nearly half of host community families, and upwards of 80% of returnee and IDP families, rely on labour in these key industries as a critical income source. This 2,000 AFN (around 29.5 USD/27 EUR) gap, in relation to overall household income converts to at least 40% of household income for the poorest households surveyed (earning less than 5,000 AFN (73.6 USD/67.7 EUR) per month), and between 20% to 40% of total income for households earning 5,000 – 10,000 AFN per month. This labour market pressure is therefore expected to be a significant source of issues related to households meeting basic



food, shelter, healthcare and education needs. For example this 2,000 AFN gap is equivalent to 1/3 of the current monthly food basket value as presented within the main Survival Minimum Expenditure Basket currently used in Afghanistan, or around 23% of the value of the national poverty line for a family of 7[44].

Graph 16 - Labour market: gap in monthly household earnings

5.5 Key Findings and Recommendations: The Labour Market System

The background and target group profile data, market maps, and gap analysis presented throughout this report can be analysed any number of ways. Findings can be drawn out in relation to a range of intervention types and agency mandates and Oxfam encourages users of this report to draw out information according to their own needs. That said, the following are key findings from Oxfam's perspective include:

Key Findings

- There has been a significant decrease in daily wages, and a simultaneous parallel decrease in the availability of labour per household. The average days of labour per month has decreased from 18 days to 13 days; despite households (primarily men and boys) still seeking labour at a similar frequency and rate.

- With the exception of some host community families, the target group (especially the less wealthy) are **not** largely reliant on agricultural labour. The agricultural labour this is performed is often through sharecropping (*dekhani*), which can be marginal in terms of livelihoods outcomes.

- Access to the labour market is heavily mediated through family and social connections. Skill possession alone does not guarantee the ability to overcome the relationship and information challenges to match those skills to demand.

- There are some significant skill differences between the returnee and host communities and to an extent also the IDP households. There is a perception that returnees may have the higher level of skills (especially in the construction and small trades sectors), but achieving "familiarity" with the new context is said to take several months.

- All of the five key labour market segments[6] have been affected by the returnee influx but demand is still evident and, with the exception of agricultural seasonality, reasonably consistent for key skills, especially those related to construction (e.g. carpentry, building painting or masonry).

- As yet, there is minimal evidence of discrimination in the labour market on the basis of displacement categories. Negative perceptions around returnee and IDP employment, when they have been observed, generally focus on security concerns (e.g. if IDPs originate from insecure areas), and a lack of familiarity and trust.

Recommendations

- If working on supply side of technical and vocational education and training (TVET), NGOs, UN and government agencies should consider carefully the training type in relation to demand and triangulate household perceptions with those of employers. This study suggests carpentry, building painting, tailoring, masonry and mechanics may be feasible.

- In TVET interventions, whether conceived as early recovery, reintegration or economic development, ensure that sufficient resources are dedicated to supporting job seeking, work placement, and labour information sharing. To the extent that there are some modest skills gap which need to be filled, the social and cultural challenges to be overcome in job-seeking are perhaps more significant.

- In line with the challenges highlighted by previous studies in Afghanistan[45], if TVET is being considered, a formalised 6 month qualification with job seeking support is the recommended minimum standard for meaningful outcomes.

- Agriculture and livestock are a minor source of income for the majority of the target group discussed in this report. Throughout, displacement, returnees and IDPs have adopted a wider diversity of labour types and skills, while for the host community themselves it is generally the more well off that have the necessary access to land to really profit from agriculture. Emergency livelihoods programming in response to the refugee influx must prioritise non-agricultural livelihoods, especially for the returnees, who have neither the land access or skill sets, and in general lack the interest and favour more lucrative urban and peri-urban possibilities.

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[6] As shown in the mapping later in this report: agricultural labour, small scale service sector, construction, loading/transport, and skilled trades.

- Shop-keeping and street vending is a widely held skill (especially amongst the returnees) and it is widely perceived as the most profitable type of activity. Though there is reason to assume increased demand for core commodities as a result of the returnee influx, this segment already appears to be highly competitive (and at provincial and district centre level, crowded). Therefore, there is a need for small business training focusing on financial management, product diversification and marketing as an alternative to start up grants. If start up grants are to be used, consider using them to support local / village level traders able to bring supply to a more local level. In line with the gender analysis above, consider bringing a focus on women's empowerment to this component.

- Cash for work programmes run by humanitarian agencies are recommended as a means to absorb labour supply and there are some possible linkages to the expansion of social and civil infrastructure, as well as bringing the housing of the most vulnerable up to a minimum level of acceptability. Since humanitarian interventions can be ad hoc and short term, consider methods by which to influence any future – larger - government public works programmes in a structural way; for example to employ vulnerable members of all communities (host, returnee, IDP).

- While there are few current indications of major discrimination against returnees as a group, it can take several months to re-establish networks required to efficiently seek and find labour, and it is reasonable that with the further influx of returnees expected through the second half of 2017 tensions may increase. Implementing agencies should be aware of these risks, and begin working already with longer term actors and stakeholders to identify pressure points, including in social and physical infrastructure. Those in humanitarian leadership positions in Nangarhar should bring together or expand a social cohesion or community engagement group for coordination in the province, and to promote both a conflict sensitive and do no harm approach.

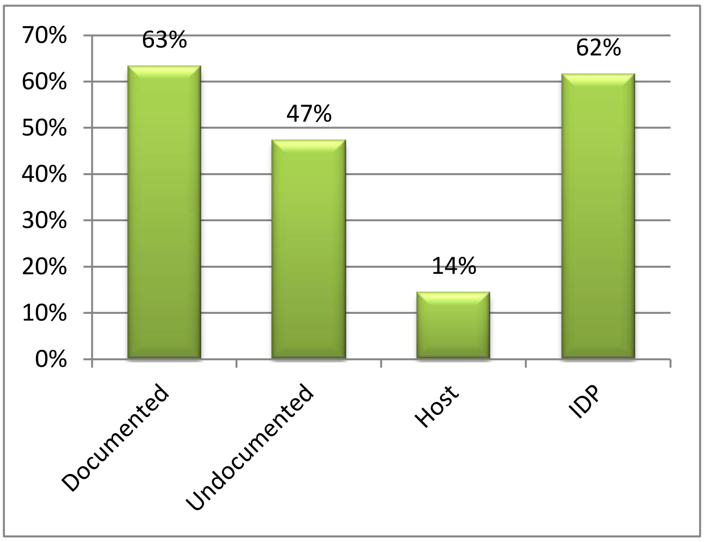
- Although not directly investigated within the scope of this study, it is reasonable to suspect that there are unknown psychosocial effects related to reduced employment for breadwinners, and a potential negative impact on gender and family relations caused by distress, the conflict environment, and loss of the economic capacity to provide[46]. It would be advisable to integrate a gender and protection lens in any livelihoods re-integration programming (using for example a Cohort Livelihoods and Risk Analysis (CLARA) type methodology).

- This EMMA has included observations of child labour and protection issues which, although not the focus of data collection, must be mentioned. There are some signs of increases in longstanding areas of concern, especially with regards to bonded and child labour, however there is no hard data yet. Regardless these concerns must be better monitored and protections advocated with support of the relevant Protection cluster and sub-clusters.

Section 6: The Housing Market System

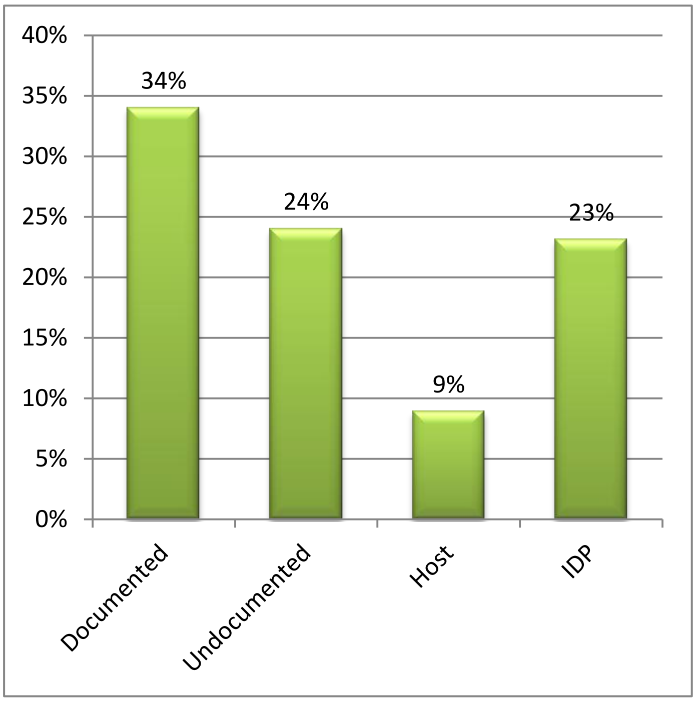
From July 2016 onwards, the heightened rate of returnee influx crossing the border from Pakistan back into Afghanistan has created pressure on the housing market for host, IDP and returnee communities alike. Access to the housing market in Afghanistan is extremely reliant on family and personal networks and relations, with private housing agents and community leaders playing a more minor role in linking house-seekers to available stock for purchase or rent. Anecdotal evidence of rising eviction rates appears to be accurate in a number of locations, with 57% of private agents and 48% of landlords spoken to sharing a perception of rising eviction rates in their areas. Primary reasons are the failure to pay rent, overcrowding of the house with multiple families (especially a noted concern when renting to a returnee household), and to a lesser extent trust and security fears related to renting to unknown persons, especially IDPs from ISIS held areas in the southern districts of the province.

Graph 17 - Potential for eviction by displacement category



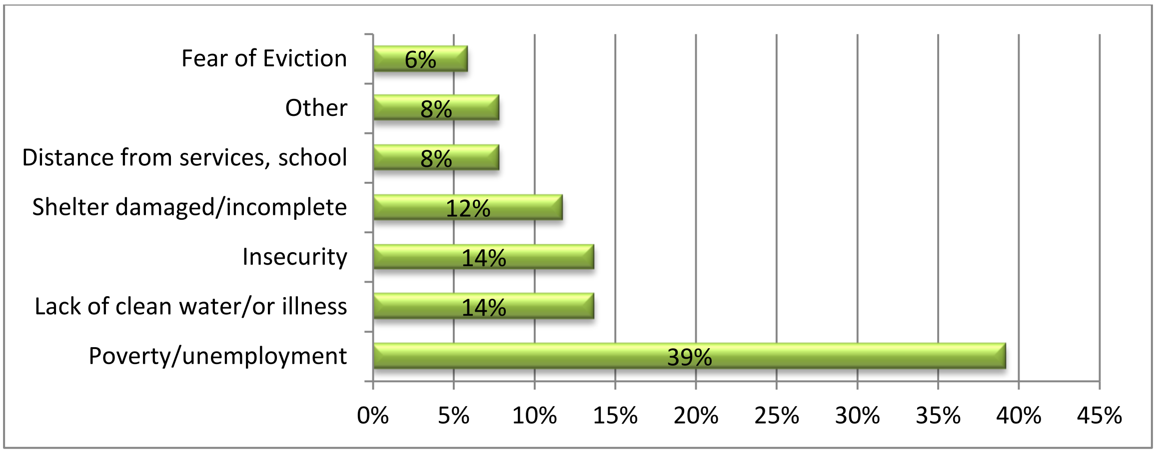
Eviction is reported to be a possibility for a majority of returnee households and nearly half of IDPs; with further data showing that, if evicted, 16% of households expect a 1 week notice, 10% 2 weeks, 27% 1 month, and 47% greater than 1 month. The trend of this data shows a pattern more closely related to social and family connections than housing type and it seems that even though host communities occupy rental houses on a reasonable similar rate as others, they are much less likely to be able to be evicted.

Graph 18 - Perception of safety/security in current residence by displacement category



A significant number of returnees and IDPs reported that they did not feel safe and secure in their current housing arrangement. A variety of reasons were given for why households felt insecure or unsafe including lack of clean water and illness, physical insecurity, damaged shelters and distance from public services, and fears of eviction. However, the top reason by far relates to poverty and unemployment – a result which Oxfam interprets to indicate a relationship between the ability of a household to earn income and more general fears about the household's ability to remain – and to remain safe and secure - in their current locations and shelter arrangements. Host communities, as may be expected, feel significantly more comfortable in their residences.

Graph 19 - Reasons for lack of safety/security in current residence



According to interviews with landlords, community leaders and private housing agents the housing stock available is expanding (somewhere between 10 – 20% in the last twelve months), but this expansion of stock has not kept pace with rising demand. This is particularly the case given the concentration of returnees and IDPs in just a handful of secure districts near the provincial centre of Jalalabad. Interviews indicate that the average time required for house construction is four to eight months, and the costs are substantial. Land requirements stand at around 500,000 to 1,000,000 AFN (7,353 USD/6,767 EUR – 14,707 USD/13,534 EUR) and the construction costs themselves are roughly estimated at 300,000 (4,412 USD/4,060 EUR) to 500,000 AFN (for a modest house capable of providing residence for a household of 7 persons).

6.1 Reference Market: market chain, environment, infrastructure and support services

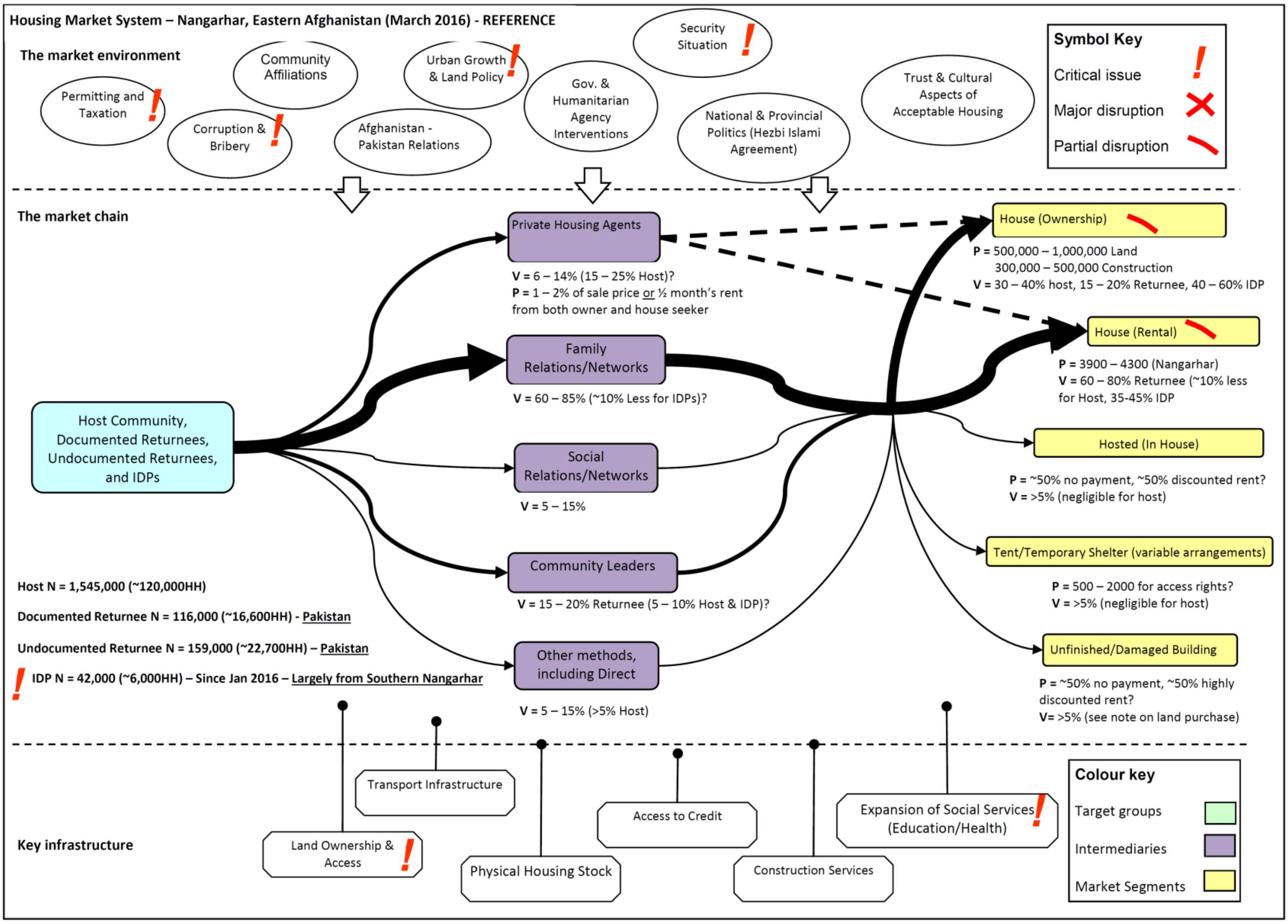


Illustration 3 - Housing market system – reference map (March 2016)

Market chain

The housing market system in March 2016 begins with our target group in residence in either host community or districts of displacement or, in the case of returnees, in Pakistan. Prior to the onset of the returnee influx, the market was dominated by two housing segments; ownership and rental. Approximately 30 – 40% of the host community reported owning their housing, and another 50 – 70% renting. IDPs had a slightly higher proportion of housing ownership, which follows from their more rural origins in southern Nangarhar and with renting being relatively more common in urban Jalalabad and surrounds. A common profile then is that IDPs were typically "able" to be in a relatively secure housing environment (due to ownership) prior to displacement, though faced a number of challenges related to poverty and unemployment all the same. In contrast, returnees reported a slightly lower housing ownership rate (in line with a lack of secure status in

Pakistan) and the highest rental rate of the different components of our target group; 60 – 80%. Fewer than 5% of households across all of the target group are estimated to have relied in March 2016 on either hosting, tents/temporary shelters (whether in a hosted situation, paying land rental, or occupation setting), or on housing in an unfinished or damaged building. Housing prices are estimated to be between 300,000 – 500,000 AFN for construction and 500,000 – 1,000,000 AFN for the land to support a modest housing situation. However, there are additional barriers in that only 36% of landlords spoken with indicated that it was possible to be allocated land in their areas without a family relation. This underlines the dominance, in similarity to the labour market, of family (and to a lesser extent) social networks and relations for finding housing of any sort in Nangarhar. Rental prices for a modest house suitable for a family of seven was 3,900 – 4,400 AFN (57,3 USD/52.7 EUR – 64.7 USD/59.5 EUR) per month, with an expected up-front payment to the landlord of 3 months' rent as a form of guarantee.

Market environment

The market environment prior to the returnee influx was already affected by the security situation throughout the province, which has impacted the housing market by limiting areas available for residence, halting investment in insecure areas, and as well by years of cumulative physical damage to the housing stock as a result of ongoing conflict. Corruption and bribery have also been noted as issues, although the sensitivities around this limit the amount of data collection on the exact pressure points. Anecdotally, the field team was told that (dependent on location) payments are required to facilitate a number of processes, from issuing licenses to act as a private housing agent, to the actual verification of rental contracts, or to seek the required approvals to construct a residence. Closely linked to this is, of course, permitting and taxation, which appears to be *ad hoc* and very locally dependent. Finally, urban growth and land policy have been a key issue in the development of the province in the reference situation. Jalalabad City has already been under significant urbanisation pressure, with the 2015 State of Afghan Cities report recording 39,586 dwellings against a population of 296,895; or 7.5 persons per dwelling. In this same year, only 3% of Jalalabad families were estimated to be above the poverty line of just 1,710 AFN (25.1 USD/23.1 EUR) per person per month, and of the urban poor in the city 75% considered themselves to be worse-off in their 2015 situation compared to previous years. As the illustration alongside shows[47], the urban boundaries of Jalalabad have already been expanded in the past, but there remains a need for rationalising these boundaries.

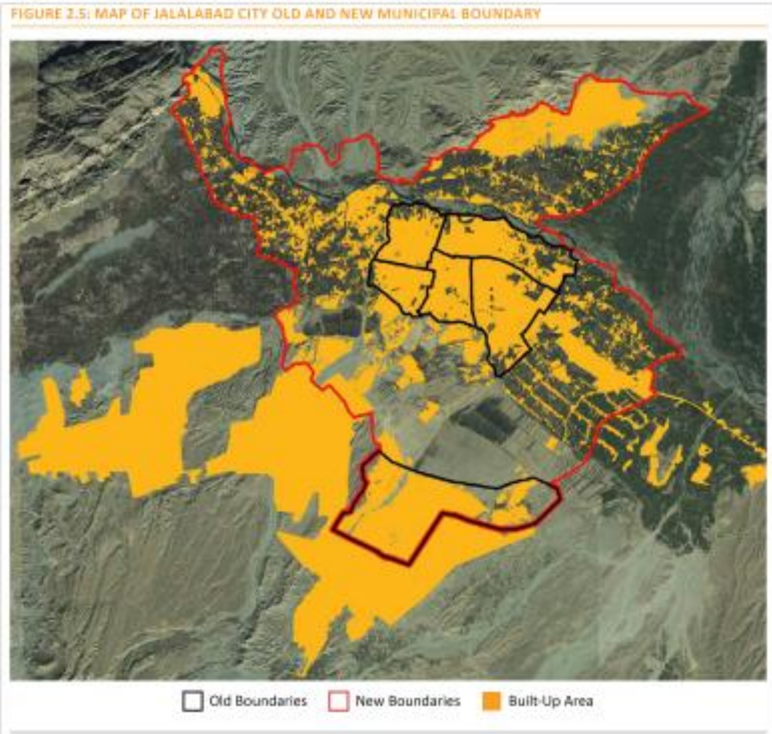


Image 3 - Map of Jalalabad City: old and new municipal boundary

Market infrastructure

Vital issues in the market infrastructure of the reference situation include the physical land ownership and access, which is an input to housing that cannot be disconnected from the market environment issues discussed above. There are also longstanding issues around the expansion or, in some cases, maintenance of the social services and public infrastructure (such as education and healthcare) which people require within an accessible distance from their residence. The housing market is also reliant on a number of the same inputs as the labour market; access to credit (and investment) and transport infrastructure, as well as construction services. A significant portion of the raw materials for construction come, in the reference scenario, through the Torkham border from Pakistan and this also places the construction industry (and thus housing) under greater pressure when there are closures of the border. There are local housing materials available locally, especially for lower quality (but acceptable) mud-brick type housing; however higher quality construction and housing types remains influenced by the ease of materials importation.

6.2 Emergency Affected Situation: disruptions & critical Issues, status of market supply and demand, market access and power

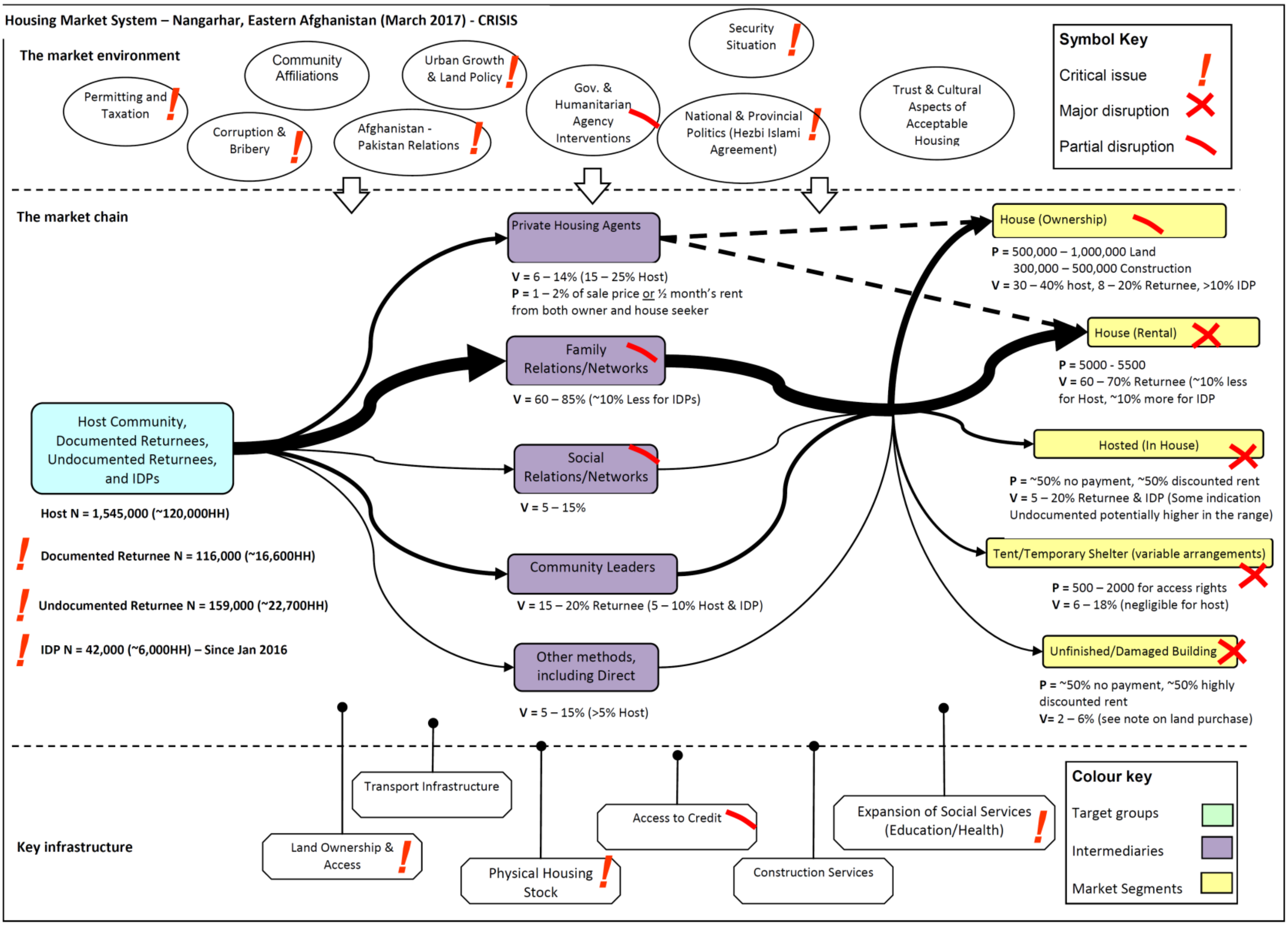


Illustration 4 - Housing market system – crisis affected map (March 2017)

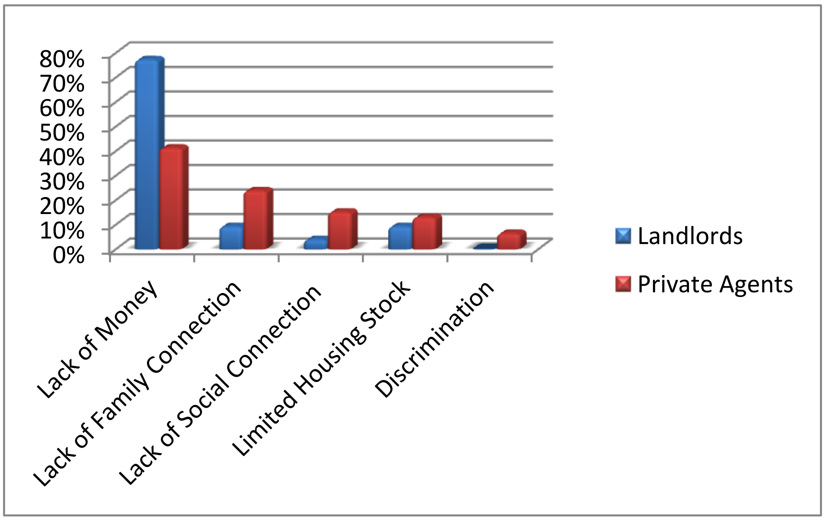
Market chain

Following the returnee influx, the "crisis-affected" market chain remains functional in terms of the pathways that are used by different sections of the target group. In contrast to the slight shifts in pathways for job seeking observed in the labour market system, Oxfam did not find any significant changes in house seeking behaviours between the reference and the crisis situation – at least not in terms of the volume of households utilising each pathway. However, there have been some large shifts in housing outcomes as a result of the pressure of increased demand (which the supply side has been unable to accommodate). Housing ownership has decreased among returnees, and reduced even more drastically for IDPs. The proportion of IDPs renting a house has increased substantially, as one would expect post displacement and yet this proportion is roughly the same for returnees, who appear to be renting in Afghanistan at relatively similar rates as prior to return. The most concerning shift in housing outcomes is the increasing proportions of returnees and IDPs being accommodated in hosting situations inside a permanent house (5 – 20%), residing in tents or other forms of temporary shelter (an estimated 6 – 18%) and unfinished or damaged buildings (2 – 6%). Average rent has increased to 5,000 – 5,500 AFN (80.8 USD/74.4 EUR) per month and families have also reported paying smaller amounts for access rights in cases of unfinished/damaged building or land upon which to place a tent or temporary shelter. As a note, a small proportion of the host community, and another portion of the returnee community have been observed residing in unfinished buildings or a tent/temporary shelter on land which the household has purchased but does not have the financial capacity to build on. Land purchase is a complex process which requires, most often, a family or strong personal connection and network as well as bureaucratic procedures to ensure title and tenure. As noted above, only 36% of landlords spoken with indicated that it was possible to be allocated land at all in their areas without a family relation.

Market environment

The market environment is quite seriously affected as of March 2017. Alongside an estimated expansion of the housing stock by approximately 15%, there have been increasing issues over land use, access and control concerning both local communities and public sector actors. National and international politics are also having an increasing influence over the confidence of potential investors in creating new housing stock (including wealthier returnees who are considering the timing and nature of their return). The humanitarian intervention itself has also affected the market environment, especially the substantial 400 USD (368 EUR) per person grants provided by UNHCR at the border to returnees were, at the time of most recent return, holding formal refugee status in Pakistan (this year set to be reduced to 200 USD (184 EUR). This large injection of cash is reported by landlords and private real estate agents to have resulted in quite a number of high priced rental contracts, which a number of families are now unable to maintain.

Graph 20 - Barriers to decent housing: landlord and private agent perspectives



Partially for this reason, but also alongside the generally increasing price of rent, 48% of landlords report observing an increase in evictions in their areas. The main reasons for eviction are failure to pay rent (81%), with lack of trust (8%) and returnee status (6%) a distant second and third. This graph alongside shows that, from the perspective of landlords and private housing agents, lack of money is clearly the most significant barrier to decent housing. However, agents also note barriers in terms of lack of family connections (24%), lack of social connections (15%), limited housing stock (13%) and discrimination (7%) at a higher rate than the landlords.

Market infrastructure

The market infrastructure related to housing in Nangarhar continues to be affected, and impeded, by many of the same issues as were present in the reference situation. The primary change is that the size of the influx, and the near certainty of its continuation throughout 2017, has increased pressure on already challenged infrastructure – schools which were already running double shifts are increasingly stretched (if returnees are able to enrol their children[7]). Field teams have observed community tensions over government plans to allocate land for settlement, as well as tensions in both rural and peri-urban/urban areas with public land holders (including the ANSF) who have observed returnees occupying land that agencies claim lays within public ownership. Access to credit also appears to be a factor in terms of inputs, and there is a marked difference between returnees who have been able to assemble enough capital to build (assuming land can accessed), and those who do not have a chance to make such an investment.

6.3 Housing Gap Analysis

Overall, interviews conducted for the EMMA suggest that housing stock in the surveyed areas has expanded in the last year by somewhere around 15%, however this has not kept pace with the estimated 20% rise in provincial population. This is especially the case with concentrations of returnees and IDPs in safe districts such as Kama and Behsud where populations have increased by up to 50%. The following two ways of presenting the housing gap are illustrative:

1) Gap in decent housing availability

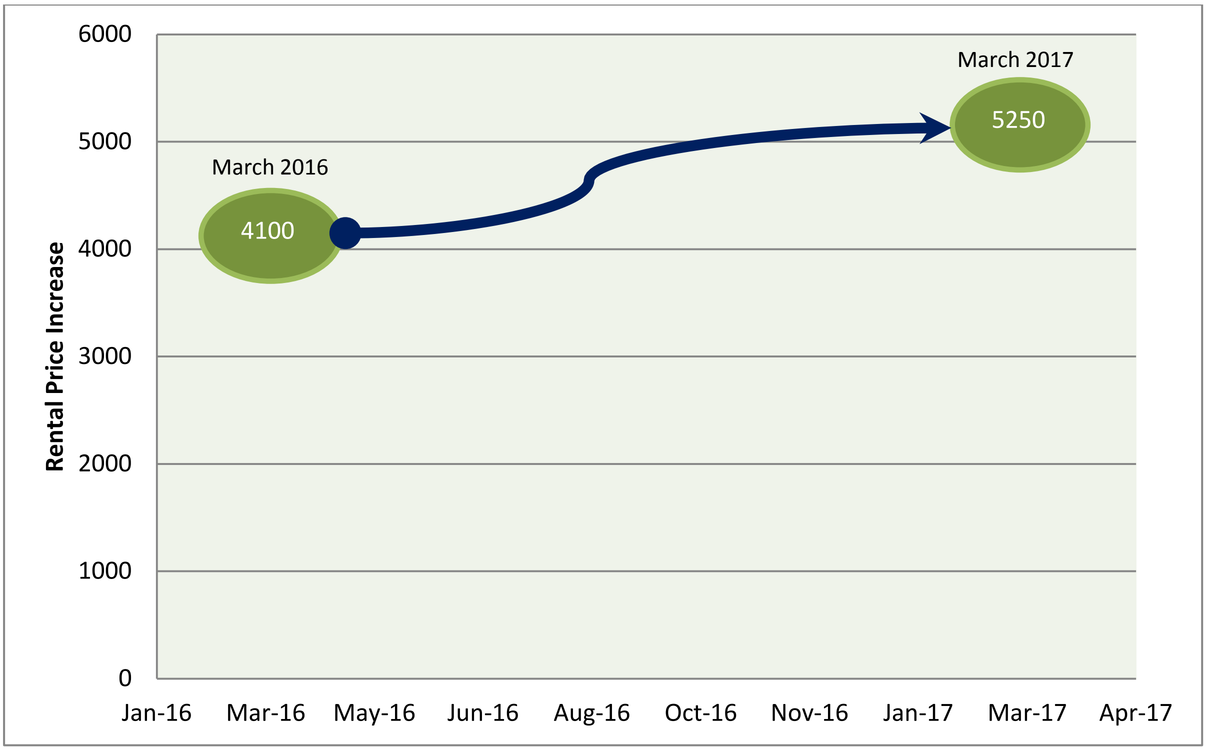
The use of sub-par housing has expanded from less than 5% of the total target population residing in situations of hosting, tents or temporary shelters, or unfinished buildings to an estimate of up to 20% of returnees and IDPs being hosted, up to 18% of the same groups residing in tents or temporary shelters (either within compounds, informal settlements, on public land or in the open), and up to an estimated 6% residing in unfinished or heavily damaged buildings. These numbers represent a “good enough” rough estimate and will certainly continue to change rapidly as the situation evolves. However, it is clear that there is a gap in the availability of decent housing stock such that there are at least two to three times the numbers of families occupying inadequate shelter solutions across the surveyed areas of the Province. This is likely to be having impact on some of the basic shelter and WASH indicators observed earlier in the report, such as less than ideal access to latrines, significant perceptions of a lack of safety and security, and morbidity indicators in winter. As well as a host of longer term social, economic and cultural issues which pose a challenge to successful re-integration.

2) Gap in rent affordability

The average rent of a house suitable for a family of seven has risen from 4,100 AFN (60.5 USD/55.5 EUR)per month in March 2016 to 5,250 AFN (77.5 USD/71 EUR)per month in March 2017 (an increase of 25 – 30%). This is creating significant economic pressure at the same time as household earnings from labour are strongly depressed. Of high importance is the fact that, like labour, this decrease in the ability of the market to provide reasonable housing at the baseline price levels is affecting host, IDP and returnee communities alike; forcing resort to negative coping strategies (such as the high levels of household debt observed), as well as reliance on sub-standard housing.

[7] Barriers in terms of school enrolment commonly relate to financial resources, transport, cultural acceptability (of female education), and the physical capacity/presence of classrooms and teachers.

Graph 21 - Housing market: gap in rent affordability



6.4 Key Findings and Recommendations

In the same tone as the presentation of findings from the labour market analysis, the data and information in this report can be analysed any number of ways and Oxfam encourage users to draw conclusion and reflect in line with their own, and their agencies, mandates and capacities. Our key findings are:

Key findings

- There is significant upward pressure on the price of rent in both urban and rural Jalalabad being driven by the influx of returnees from Pakistan.

- This shift in demand has concentrated market power with landlords, who are increasingly requiring certain categories of people – especially those who lack key documents such as a *Tazkira* and a letter of guarantee – to pay an increase amount of rent up-front; from 3 months to 6, or in rare cases 12 months (the entirety of most rental durations).

- Returnee and IDP families are increasingly occupying sub-standard housing options (tents, unfinished and damaged buildings), from less than 5% of returnees and IDPs occupying either of these housing types, to 5 to 20% occupying each. In total, the upward-end estimation is that just less than half of IDPs and returnees are occupying sub-standard housing options.

- Housing costs and access to public services and livelihoods options are pushing in opposite directions: the most expensive housing facilitates access to employment, education and health services, and tends to be more secure, yet places the greatest economic burden.

- Access to the housing market, similar to the labour market, is also heavily mediated through family and, to a lesser degree, social connections. There is some evidence of discrimination in the housing sector with regards to displacement (at least to a greater extent than that observed in the labour market).

- The majority of IDPs and returnees (both documented and undocumented) report an intention to remain in Nangarhar, with the implication that secondary movements to other areas of Afghanistan may be relatively minor.

Recommendations

- Include in any unrestricted cash transfer programme, especially multi-purpose cash grants, at minimum at least the value of the estimated rent affordability gap (1150 AFN per month); while maintaining flexibility to adopt an increasing value for more vulnerable households. Alternatively, consider using rental vouchers and linking directly to landlords for increased security (and potentially acceptance and/or avoidance of demands for excessive up-front payments by vulnerable households).

- Consider the feasibility of supporting newly arrived households to meet lump-sum rent advance requirements, either directly or through micro-finance institutions. Though maintain targeting to those most vulnerable (by needs indicators, **not** by displacement or returnee category, or former legal status in Pakistan) so as to avoid local market distortions.

- Expansion of housing stock takes time. Consider quick impact options for market based temporary shelter programmes to increase safety and decency of sub-standard housing types. This could include linking improvements with cash for work to use community labour to make simple physical improvements to sub-standard housing; for example completing walls, doors, internal divisions. Or by providing small housing improvement grants for situations of hosting in tents, and providing vulnerable households with vouchers for construction services. Land ownership arrangements are complex, and external agencies may face challenges in intervening directly to construct even temporary or semi-permanent structures. In this situation a market based approach provides not only further choice to the beneficiary, but also allows for more local navigation of which minor improvements in safety, and quality, are acceptable in the context of a multitude of complex land access arrangements.

- Returnees are arriving with little information and knowledge around how to navigate the formal and informal contracting arrangements being used to secure housing. Consider including education and outreach on house finding and contracting practices alongside other community engagement activities and/or engaging with landlords (or in rural areas the Maliks who tend to exert some influence over market operation) to discuss alternatives to up-front payment beyond 3 months and flexibility in documentation for informal contracting.

- Consider methods of supporting vulnerable households to gain access to basic identity documents (as well as qualifications) upon arrival in Afghanistan, as these can be vital for securing housing.

- Advocate for an increase in temporary, and market based, shelter support (in funding and intervention terms) as an immediate measure to improve living conditions (whether through cash or voucher based programming). Avoid expensive permanent housing programmes unable to deliver in the short term, inappropriate for the most vulnerable, or which are likely to run up against complex land tenure issues which external agencies are not well placed to resolve. Empower vulnerable families with the financial resource to negotiate their own solutions.

- Operational humanitarian agencies who are implementing on the ground in Nangarhar should be engaging more with longer term actors and stakeholders to advocate for sensible urban growth policies in Jalalabad, and land access province wide. These are large issues which have already been under discussion for some time, however, greater connection of the response with evidence from the ground, and highlighting the potential costs of failure to account for returnee population growth, may encourage action.

Section 7: Conclusions

Complex conflict and displacement, including the returnee influx from mid-2016 onwards, has severely impacted the ability of the labour and housing market systems in Nangarhar province to meet the needs of vulnerable host, returnee and IDP communities. This Oxfam study has mapped the function of these two key markets and, drawing from a reference situation set in March 2016, has identified and quantified gaps in the form of a much reduced capacity for these markets to supply both labour income, and decent housing at accessible pricing. The current situation continues to place the target group (vulnerable host community families, documented refugees returning, undocumented returnees, and IDPs) under a significant degree of economic stress and has implications for multi-sector vulnerability and needs in terms of food security, shelter, Water, Sanitation and Hygiene (WASH) and protection. While this EMMA study is based on thorough field research in Nangarhar, Oxfam recognises that it still represents only a snapshot of a situation that is in constant flux. It is therefore important to continue to monitor the situation of the local labour and housing markets, especially as the influx of returnees is expected to continue in the foreseeable future and the security situation is far from stable.

A number of market based humanitarian interventions have been recommended which, in the short term may help provide immediate support to those with needs related to these markets; essentially those vulnerable and marginal families in Nangarhar seeking work and homes. Market based interventions include cash for work (with a potential linkage to minimal improvements to sub-standard housing), shifting from emergency to temporary shelter with a focus on rent support, addressing the high cost of increasing demands for 6 months of rent advance, and using cash for work or vouchers to ensure that housing meets minimum protection requirements in the context of Afghan culture (for example walls and doors to create privacy around tents). Ideally, pricing in the value of the actual gaps in income and housing affordability in the use of multi-sector cash grants or, in the case of housing a rental voucher – potentially with landlords directly reimbursed, is also a way forward. If using a housing voucher to cover the rental gap, this effectively operates as a subsidy with the household completing the remainder of the payment to the landlord.

Based on the labour and housing gaps identified here, we recommend a multipurpose, multi-round (up to 6 months) cash transfer valued at a reasonable portion of the minimum expenditure basket so as to align to the identified gaps (with allowances for highly vulnerable groups). Such that the housing gap and income gap are covered at minimum (Oxfam recommends that the housing gap be marked against the shelter component of any basket, and the income gap against the food component). Given the complexity of these markets, and the amount of social labour and networking required for returnees and IDPs to re-strengthen the networks by which both labour and housing are mediated, Oxfam suggests that one of the best ways in which the vulnerable can be supported is to be given time to do this necessary re-establishing.

There is reason to believe that with the current contextual scenario, and near certainty that response will be required for a further returnee influx, a longer term cash grant provided to a household consistently over several months may be more effective than a large lump sum payment of equivalent value provided either at the border or after settlement. There are a number of operational challenges in delivering multi-round cash in Nangarhar province, but there is a strong technical rationale for looking at ways to overcome these. This is in large part due to the primacy of family and social networks in securing access to jobs and housing. To have lump sum funds to invest is one thing, but to have the connections to facilitate action is another (perhaps more time consuming) concern. This is a technical discussion which implementing agencies and donors should contribute, and the national Cash Working Group has already begun to approach the issue of multipurpose cash grants, their valuation, and use.

In the longer term, there are some limited opportunities for TVET and labour market interventions in spite of the challenging supply and demand situation. However, training interventions – especially in the skilled trades must take care to dedicate sufficient resources to job seeking and placement support, as well as ensure that qualifications are sufficiently formal and in depth so as to be recognised and meaningful. A cursory glance at the labour market map confirms that, with the importance of mediators and intermediaries (often family) in the labour market, the question is not so much how to train a carpenter but how to find a carpenter work when carpentry is not the family business or not the traditional business within a known and trusted network. Opportunities also exist in the agricultural and livestock sectors, primarily for the minority of the host community and IDPs who possess this skill-set. However these must be approached with a degree of caution, and agricultural livelihoods interventions are not recommended as appropriate interventions targeting returnee populations in the province (due to a lack of familiarity, will, and access to land).

This study also presents evidence that, so far, a degree of goodwill exists around the re-entry of the returnees into both the labour and housing markets (with a higher degree of friction in the latter). This should not be taken for granted, as the nature of the market is to link households together. Wages fall and rent rises in a way that appears to affect all households. Integrating conflict sensitivity into community engagement and outreach is highly important, as well as ensuring a close connection between the shorter term humanitarian response and the longer term governance and development programmes in the province – such as ensuring that the work under the Citizens Charter in Nangarhar accounts for the humanitarian realities and stresses. The humanitarian community must also engage with both the government and longer term development actors (there is a group of concerned agencies for which UN-HABITAT is a focal point) in the ongoing discussions around land rights and longer term re-settlement, as well as municipality and district level governance and policies around urban growth and service provision.

Throughout the research Oxfam observed that in terms of the pathways by which documented (formerly refugee) and undocumented returnees access the labour and housing markets, there are very few significant differences. This applies as well to outcomes of access to these markets in terms of income from labour and the ability to secure housing. From this Oxfam concludes that, once past the border, it would not generally be appropriate to target beneficiaries for humanitarian intervention on the basis of their former legal status in Pakistan. Oxfam recommends instead to target on a needs basis in line with the sector of intervention.

This study has unearthed an increasingly fragile situation in Nangarhar province, with extremely high levels of stress in both the casual labour and housing markets. The average vulnerable labour reliant family in districts of the province with high levels of returnee influx appears to be facing a monthly income gap of 2,000 AFN (roughly 29.5 USD or 27 EUR), and housing which is approximately 1,150 AFN (17 USD/15.5 EUR) per month more expensive than in the past. This situation is expected to be exacerbated with the continuing return of both documented and undocumented Afghans from Pakistan throughout 2017, and with the additional challenges of the volatile security context. Throughout the course of this study Oxfam has observed varying degrees of down-skilling, a mis-match of skills in the market, housing expansion falling behind demand, increasing resort to sub-standard and unsafe housing, and numerous other factors already de-stabilising these two key markets. Beyond these concerns, the evidence shows a huge reliance of vulnerable families on (extended) family networks to find and maintain both labour and housing. For many this seems to be a form of resilience - stabilising a situation where one would often find much greater tension, distrust and social conflict. Yet for others it is less clear that how and where to manoeuvre, if these links are lacking.

Annex 1: data collection and consultations list

<u>Data Collection</u>

Profile / Needs Assessment Data

Returnee Profile (Undocumented)
Data Source: HEAT Survey of 2052 undocumented Returnee Households in Nangarhar, conducted in March 2017

Survey Locations	Households	Proportion
Jalalabad	725	35.3%
Kama	549	26.8%
Behsud	431	21.0%
Surhkrud	347	16.9%
Total	2052	100.0%

IDP Profile
Data Source: HEAT Survey of 280 IDP Households in Nangarhar, conducted in March 2017

Survey Locations	Households	Proportion
Jalalabad	138	49.3%
Kama	9	3.2%
Behsud	13	4.6%
Surhkrud	120	42.9%
Total	280	100.0%

Host Community Profile
Data Source: Oxfam Assessment Tool Survey of 597 Host Community Households Conducted March 2017

Survey Locations	Households	Proportion
Jalalabad	346	58.0%
Kama	119	19.9%
Behsud	44	7.4%
Surhkrud	88	14.7%
Total	597	100.0%

Household Surveys

EMMA Data (Households)
Data Source: EMMA 185 Households in Nangarhar, conducted in March/April 2017 (118 male respondents, 66 female respondents)

Survey Locations	Households	Proportion	Displacement Category	Households	Proportion
Jalalabad	60	32%	Documented	53	29%
Kama	55	30%	Undocumented	50	27%
Behsud	22	12%	Host	56	30%
Surhkrud	48	26%	IDP	26	14%
Total	185	100%		185	100%

Employers Survey

Emma Labour Data (Employers)
Data Source: EMMA Survey of 68 Employers in Nangarhar, March 2017 (67 Male, 1 Female)

Survey Locations	Employers	Proportion
Jalalabad	28	41.2%
Kama	18	26.5%
Behsud	19	27.9%
Surhkrud	3	4.4%
Total	68	100.0%

Employer Types	
Food Service/Restaurant	4
Agricultural Land Owner	8
Building Equipment Supply	6
Building Owner	6
Medical Supply Store	2
Car Washing	1
General Shop	14
Cement Supply	3
Construction Company	8
Driving	1
Unspecified	1
Factory	4
Masonry Company	2
Mechanic Shop	1
Metalwork Shop	1
Painting	1
Bike Repair	1
Tailoring/embroidery	1
Fresh food vendor	2
Wood supply	1

Labour Contactors Survey

Emma Labour Data (Labour Contractors)

Data Source: EMMA Survey of 15 Labour Contractors, March 2017

Survey Locations	Contractors	Proportion
Jalalabad	5	33.3%
Kama	7	46.7%
Behsud	3	20.0%
Surhkrud	0	0.0%
Total	15	100.0%

Housing Provider / Landlord Survey

Emma Housing Data (Housing Providers)
Data Source: EMMA Survey of 58 providers of housing (owners) in Nangarhar, March 2017

Survey Locations	Owners/Providers	Proportion
Jalalabad	16	27.6%
Kama	18	31.0%
Behsud	20	34.5%
Surhkrud	4	6.9%

Total	58	100.0%

Private housing Agent Survey

Emma Housing Data (Housing Agents)
Data Source: EMMA Survey of 21 housing agents (private sector) in Nangarhar, March 2017

Survey Locations	Owners/Providers	Proportion
Jalalabad	8	38.1%
Kama	6	28.6%
Behsud	6	28.6%
Surhkrud	1	4.8%
Total	21	100.0%

<u>Interviews and Consultations</u>

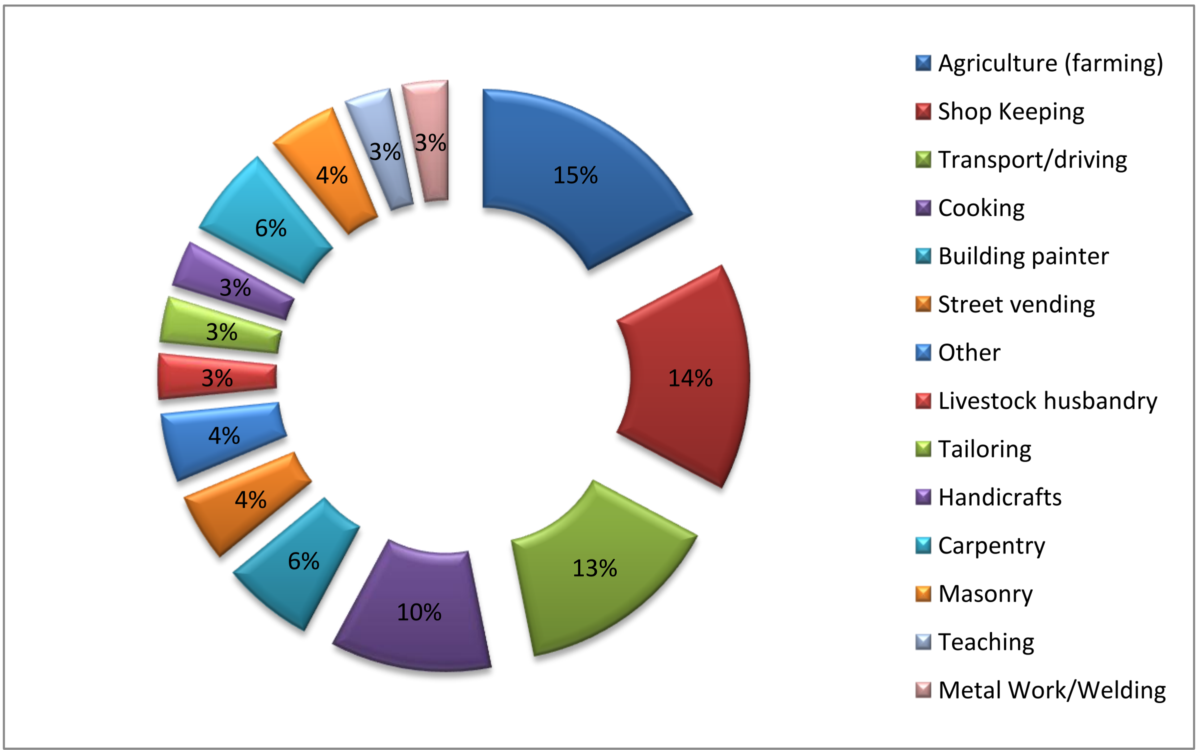
16 Maliks in Kama, Behsud, Surkhrud and Jalalabad (one per each survey location)

Jalalabad
Assistance for Health, Education, and Development Afghanistan (AHEAD)
Department of Labour and Social Affairs
Department of Cultural Affairs
Department of Returnee and Repatriation
Department of Rural Rehabilitation and Development
International Organisation for Migration (IOM)
International Rescue Committee (IRC)
Norwegian Refugee Committee (NRC)
United Nations Office for the Coordination of Humanitarian Affairs (UN-OCHA)

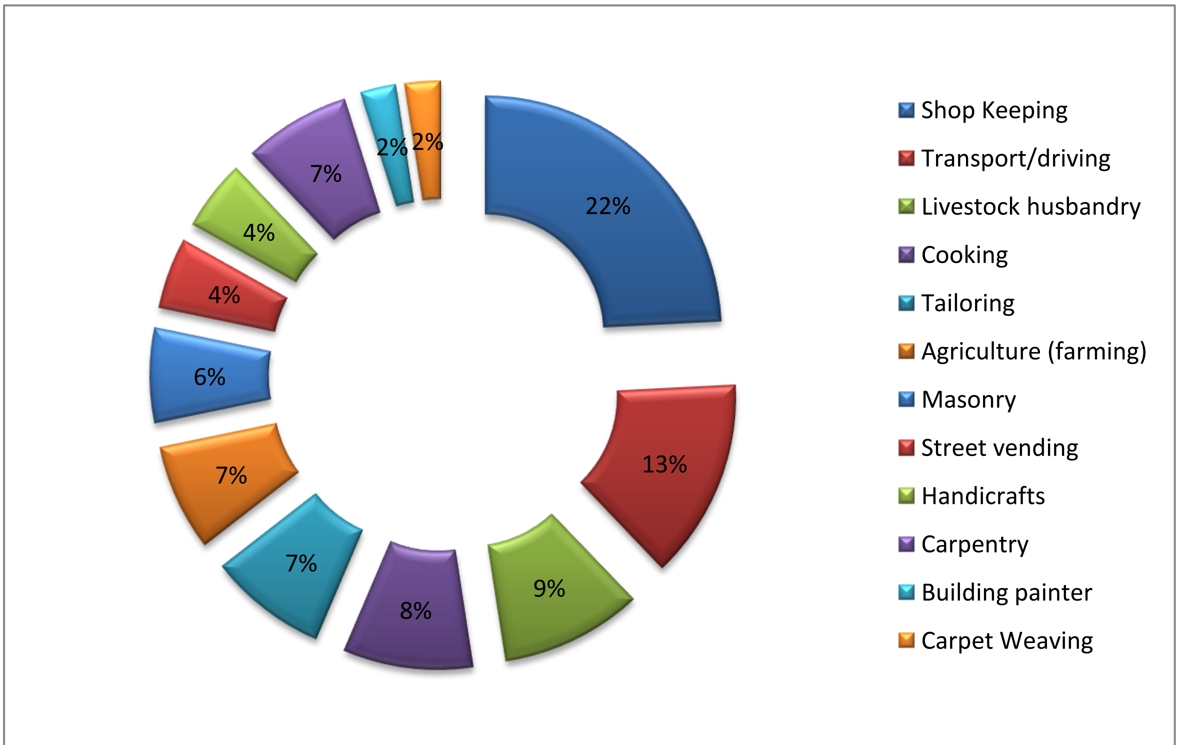
Kabul
Afghanistan Food Security and Agriculture Cluster (FSAC)
Afghanistan Cash and Voucher Working Group (CVWG)
Afghan Development Association (ADA)
Care International
Cordaid
Save the Children (SCI)
UN - HABITAT
ZOA International Afghanistan

Annex 2: detailed graphs of skill possession and perceptions of profitability

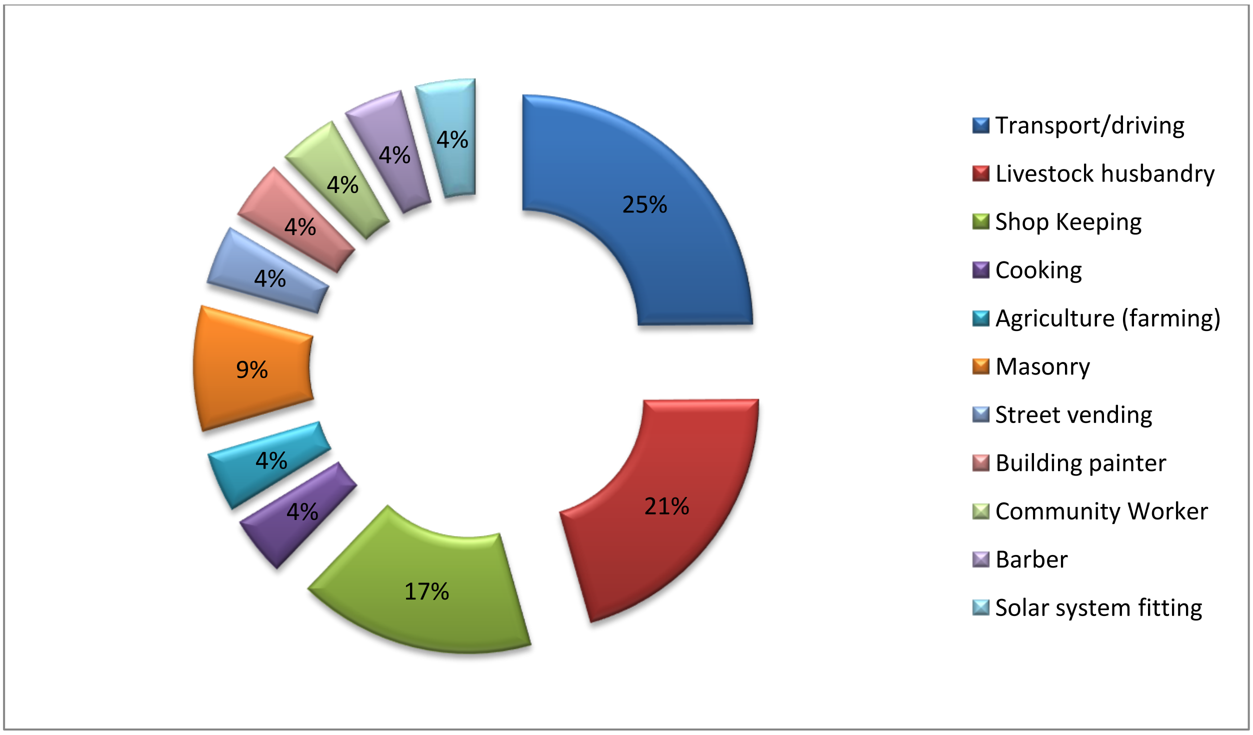
Graph 22 - Host community: skills possessed



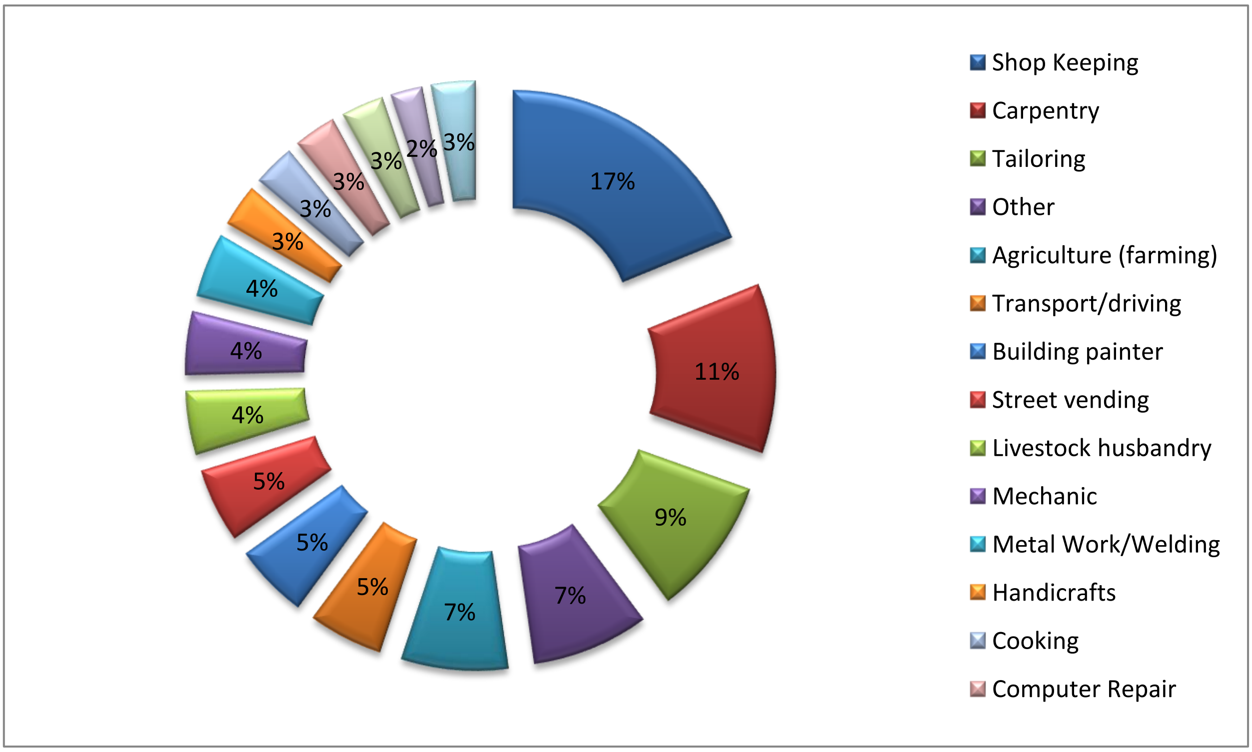
Graph 23 - Returnees: skills possessed



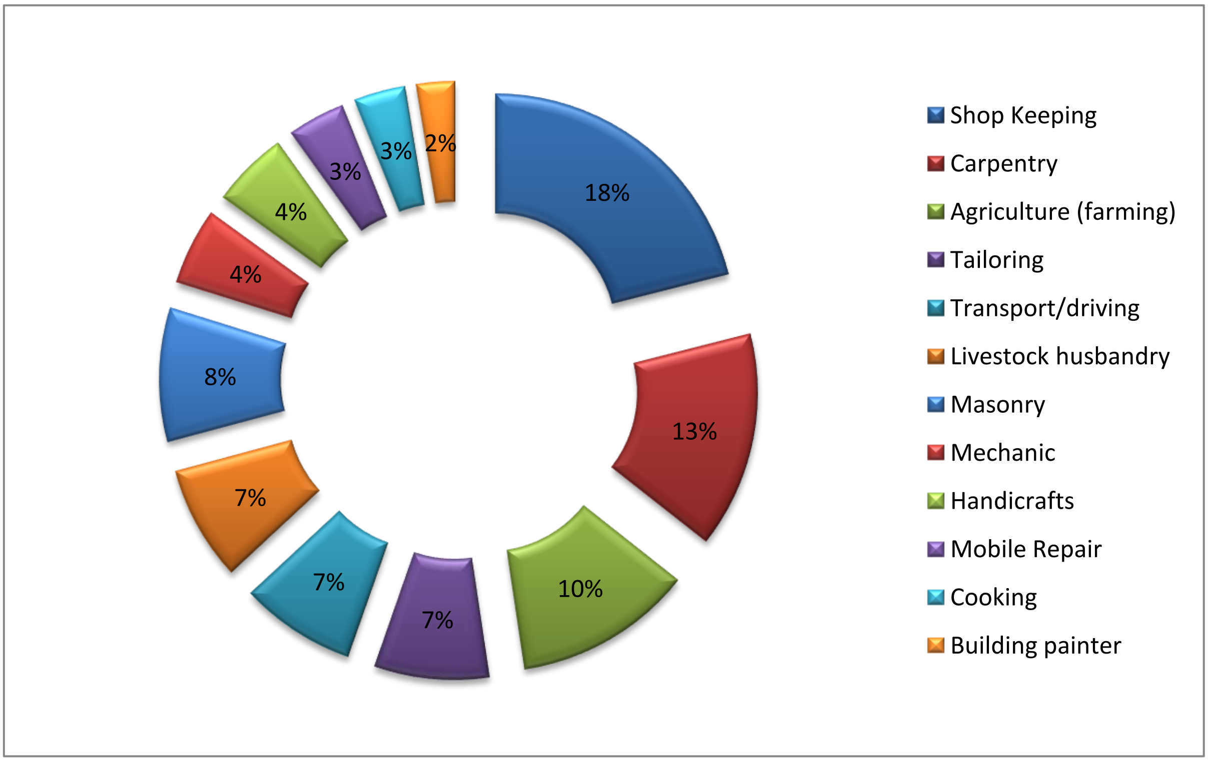
Graph 24 - IDPs: skills possessed



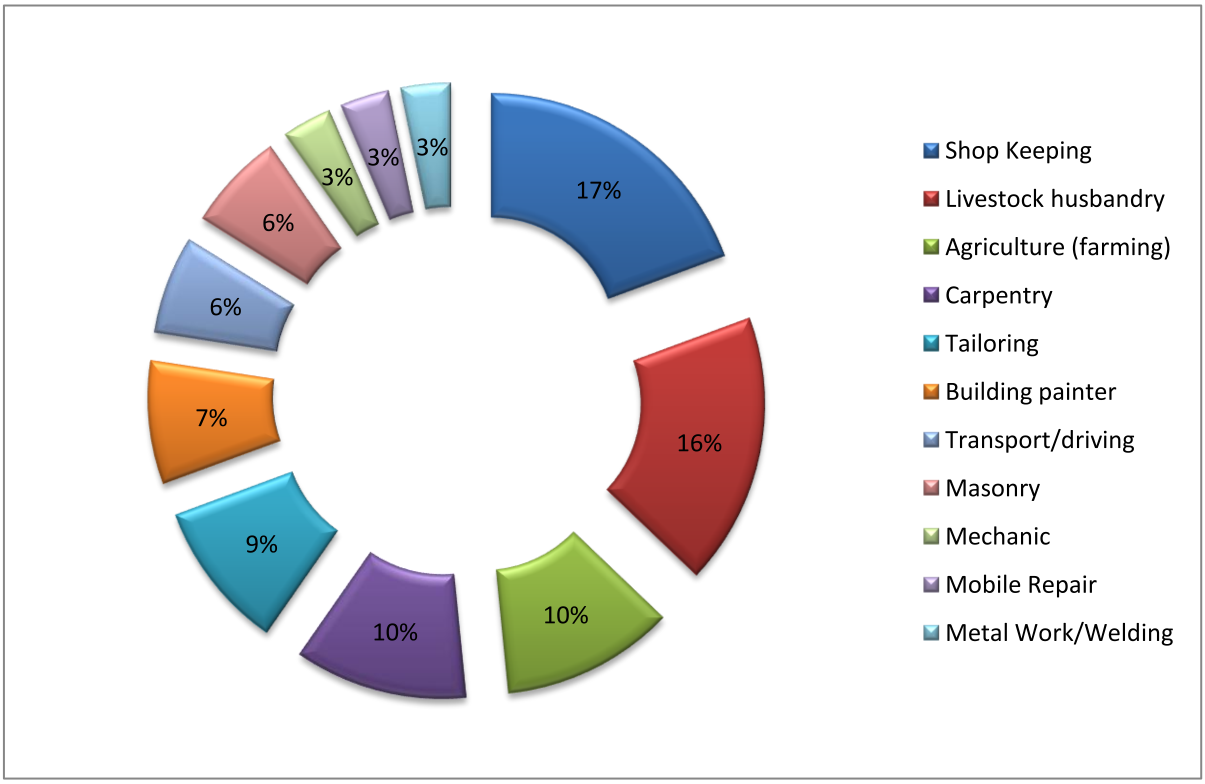
Graph 25 - Host Community: skills perceived to be profitable



Graph 26 - Returnee: skills perceived to be profitable



Graph 27 - IDPs: skills perceived to be profitable



Skills Listings: for reference فهرست مهارت ها

1	Ac./Refrigerator Repair مستری یخچال و آیر کاندیشن	9	Bicycle Repair مستری بایسکیل	17	Carpet Weaving قالین بافی	25	Computer Use استفاده کننده کمپیوتر	33	Embroidery موره بافی/گلدوزی
2	Agriculture (Farming) دهقان/دهقانی	10	Building Painter رنگمال	18	Ceramic/Marble Tiling	26	Electrician (semi-skilled) برقی نیمه ماهر	34	Furniture Making موبل ساز/موبل سازی
3	Barber سلمان/سلمانی	11	Carpentry (semi-skilled) نجارنیمه ماهر	19	Community Worker کارمند اجتماعی	27	Electrician (skilled) برقی ماهر	35	Gems/Jewelry Production زرگر/زرگری
4	Bee Keeping زنبور داری	12	Carpentry (Skilled) نجار ماهر	20	Computer Repair ترمیمکار کامپیوتر	28	Electronic Repair ترمیمکار وسایل برقی	36	Generator Repair جنراتورساز/مستری جنراتوز
5	Handicrafts دست دوزی	13	Masonry (semi-skilled) گلکار نیمه ماهر	21	Mobile repair ترمیمکار مبایل	29	Solar Fitting System	37	Teaching معلم/تدریس کننده
6	Health Worker کارمند صیحی	14	Masonry (skilled) گلکارماهر	22	Cooking آشپز	30	Stone Carver سنگ تراش	38	Transport/Driving درایور
7	Leather Processing چرک گری	15	Mechanic میکانیک/مستری	23	Plumber نلدوان	31	Street Vending دستفروش	39	Waste Picking
8	Livestock Husbandry مالداری	16	Metal Work/Welding فلزکار	24	Shop Keeping دوکاندار	32	Tailoring خیاط/خیاطی	40	Other (Specify) سایرموارد مشخص سازید

Annex 3: Reference List

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