

Market Assessment Report

Identification of Skill-Based Trainings to Afghan
Refugee Communities of District Quetta

25th July, 2016



Conducted by
Tameer-e-Khalaq Foundation

Under Program
"Integrated Humanitarian Assistance for
Afghan Refugees in Balochistan Through
Provision of Education Assistance (AEP) and
Livelihoods Support 2016"

In Partnership with
Norwegian Refugee Council



**NORWEGIAN
REFUGEE COUNCIL**

Abbreviations

TKF	Tameer-e-Khalaq Foundation
FA	Faculty of Arts
F.Sc	Faculty of Science
FGD	Focus Group Discussion
POR	Proof of Registration
PPVR	Population Profiling, Verification and Response
TTB	Trade Testing Board
UNHCR	United Nations High Commissioner for Refugees
IDO	Innovative Development Organization

Introduction

Since 1980, owing to instability in Afghanistan, millions of Afghan nationals have become displaced from their homes and have come across the border to Pakistan as refugees. According to estimates, more than 1.5 million Afghan refugees are still residing in Pakistan, and have since not only built permanent residences but have acquired livelihood as well. Most Afghans in Pakistan (82.6 percent) do not intend to return to their homeland at present. Out of the 17.4 percent who do wish to return, most reside outside the refugee camps and 39.9 percent currently live in Baluchistan. As the repatriation plan for Afghan refugees is in process, the “pull factor” needs to be strengthened to make that an ease. A person skilled with vast scope at home town will be more willing to return than an unskilled labour. Vocational institutes, skilled livelihood opportunities for Afghan refugees residing in RVs and urban settlements would mark a significant role in repatriation process.

Initially the Afghan refugees had no set form of income generation other than farm labor or construction labor, however with the support of UNHCR, and Govt. of Pakistan their livelihood has improved to some extent.

However, there is still a serious lack of livelihood opportunities for refugee men/women residing in the refugee villages or in urban settlements, especially in Balochistan as shown by UNHCR Balochistan and its Participatory Need Assessment (PNA) of 2014. According to this assessment, Afghan refugee population relies heavily on unskilled labour for income generation. As a result, they usually get jobs involving the use of physical strength, which usually pays poorly for the needs of a refugee family, and is not a viable means of income throughout the year. For upto 4-5 months of winter of Quetta, work is unavailable and families become chronically destitute. Families facing such financial problems also involve their children in manual labour where they are often exposed to risks, exploitation and abuse.

Refugee women, who are unable to perform manual labour roles, find themselves not having any means of earning an income and are therefore especially vulnerable.

The shortfall in income causes communities to be otherwise reliant on external support (humanitarian/governmental).

The PNA report also identifies other factors for lack of livelihood opportunities to Afghan Refugees in Refugee Villages situated at Quetta, Loralai, Chaghi and Qilla Saifullah. These include:

- Distance from the market;
- Low purchasing power of the people living in refugee villages (and therefore lower market demand);
- Unskilled human resource;
- Accessibility and movement problems for women;
- Discrimination against people with disabilities (and also the different types of jobs they take up)

About TKF

Tameer-e-Khalaq Foundation (TKF) is a national-level non-profit NGO was founded in 2004 for the purpose of bringing sustainable positive change to vulnerable and consistently deprived communities across Pakistan. Beginning its journey with meagre resources and staffed by a relatively inexperienced group of idealists, they were none-the-less determined and in just 2006, managed to convert their efforts into a much-needed public school in the district of Quetta. From this proof-of-concept of their vision, the non-profit NGO has grown dramatically and rapidly. Today, TKF fields a staff of more than 150 in 4 offices and an average annual turnover of 126.67 million PKR. It has worked in 51 projects across 23 districts and 3 provinces of Pakistan, benefitting almost 1.15 million men, women and children.

Its work currently centers around 6 main programmatic areas:

- WASH, Environment, Shelter & NFIs
- Basic Health Services and Nutrition
- Empowering Community through Protection, Education, and Livelihoods
- Infrastructure
- Agriculture & Food Security

TKF has a qualified and experienced team with a wide ranging skill set, mainly comprising of the following areas:

- Gender and Gender Sensitive Programs;
- Livelihood Support and Vocational Training;
- Formal & Informal Educational;
- Monitoring and Evaluation;
- Beneficiary Feedback;
- Institutional Development;
- Participatory Approaches and Methodologies; and
- Mainstreaming Environment and Disability;

TKF has decades long experience of implementing development and emergency response projects- that includes prolonged Afghan refugees, flood & earthquake responses, and complex emergency response of KPK. It has extensive experience of working with temporarily displaced persons (TDPs) and refugees both in camps and off camps/host community settings.



Aims and Objectives of the Survey

The labor market assessment/survey seeks to address the following objectives:

- Identify potential trades (skills) for Registered Afghans residing in Quetta (urban) which will be able to provide beneficiaries gainful earning in both Pakistan and Afghanistan while considering the point-of-view of local professionals and employers as well as end-users;
- Identify how many Afghan refugees residing in Quetta (urban) are willing to change their current means of income generation by enrolling in vocational training

Methodology

Development of Survey Tool and Orientation Workshop

In close consultation with program staff, the team designed a comprehensive questionnaire to collect primary data, both for individual interview of male and female as well as an agenda questions for Focus Group Discussion (FGD's). Desk Review was also conducted parallel to FGD process to guide findings (details below).

After finalization of data collection tools (Questionnaires), the project team conducted an orientation on the tools and oriented the enumerators about data collection methodology.

Identification of Intervention Area

Afghan Refugee concentrated areas were identified by field visits and review of TKF's own data (from previous local experience) and information gained via informal meetings with other organizations operating in the same sector and area, such as IDO, Mercy Corps., WESS, DANISH and Livelihood working group. Implementing area was also chosen in consultation with livelihood working group so as to prevent any duplication via selection of same areas or selection of same beneficiaries. Informal meetings were held with the community elders of refugee areas in which they were informed of the intervention and the upcoming market-assessment survey.

Focus-Group Discussions and Desk Review

Two formal Focus-Group Discussions (FGDs) were scheduled in which groups of women (20) and men (21) from the community were consulted regarding:

- 1) Potential trades and **state of market employment** (i.e. opinions of shopkeepers, sector-specific employers, or experienced individuals who were especially consulted as far as possible to comment on this from their experience)
- 2) Factors that may affect the project, including willingness to undertake training and change their career path.

After FGDs, individual interviews among community were conducted in which enumerators visited various areas to gather data.

For this report, a desk review of prior studies (by NRC, IDO, UNHCR) was also used so as to guide the conclusions from the FGDs and to glean additional useful recommendations and information for the intervention.

Sample Size for Individual Interview Survey

The details of the Sample Size are as follows:

Area	Total Number of Households	Total Population	Targeted No. of Households from each area (1 individual from each)
Arbab Gali	1575	11340	46
Bashir Chowkh	250	1800	9
Bank Colony	212	1526	15
Raisani Road	690	4968	2
Shahi Chowk	270	1944	23
Kashmirabad	195	1404	78
Turkaman Colony	285	2052	14
Tajikabad	201	1447	26
University Chowk	170	1224	35
Total	3848	27705	248

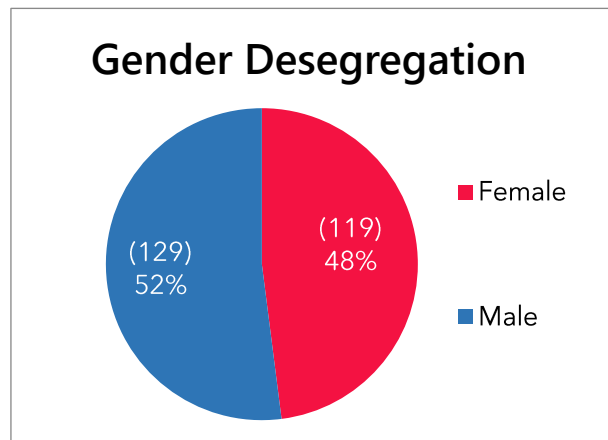
Average Household Size= 7.2

Source: Population Profiling, Verification and Response Survey of Afghans in Pakistan 2011

The team conducted 248 individual interviews of Afghan Refugees for the identification of most in-demand trades for Afghan refugee youth in Pakistan in refugee settlements in Quetta. Due to Pakistan state policy, the program team focused on the candidates (trainees) who have valid residential documents (POR Card's) in Pakistan.

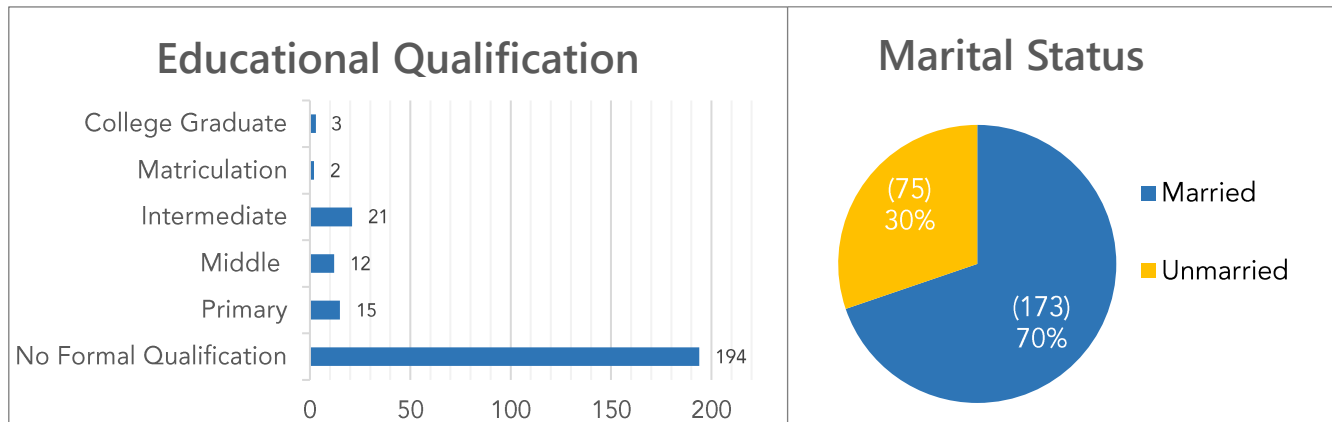
The data shows that, 129 (52%) male and 119 (48%) female individual participants were interviewed.

The average age of the interview participants was 27.8 years.



The majority (78.2%) of the participants interviewed during Labor Market Survey/ Assessment were illiterate, 6% (15) were primary pass, 4.8% (12) were middle pass and 8% (21) of the interviewed participants had an intermediate level (F.A/F.Sc) qualification. Only 3 of the interviewed individuals had sought education up to graduate level. And only 2 participants of the interviews had done matriculation.

From 248 individual interviewed, 70% (173) participants were married/engaged while 30% (75) participants interviewed during assessment were unmarried.



Findings of Focus Group Discussions (FGDs):

Focus Group Discussion or commonly known as FGD is considered to be a very effective tool for seeking a quick insight into the situation of any area. In order to get a clearer picture of the target community/individuals, TKF staff conducted two separate FGDs i.e. one with male members of the community and the other with female members which were the priority of the survey. Suppliers, defined as vendors, employers and other distributors of the beneficiaries' work were prioritized for attendance in the FGDs and whose input was given due consideration in guiding selection of trades. The main points raised in the FGDs were as follows:

- The majority of individuals in FGD were keenly interested in seeking skills but those who were already employed indicated that they were not able to spend time on these activities due to it compromising their regular income. Community elders who were present for TKF's earlier intervention suggested that similarly to earlier projects, trainees should be given a stipend that should be good enough to meet the trainees' needs during the training program, to aid needs of unemployed as well as to compensate employed beneficiaries for any earning time lost.
- Female and Male elders in FGDs insisted on female Master Trainers for female trainees and male MTs for male trainees. Community also requested accessible locations for Training Centers, especially those for women.
- Community insisted that religious and social norms would be followed and would take precedence over NGO procedure (i.e. M&E teams with males would monitor female trainings only with prior permission of community).
- FGD participants were asked about which trades they felt were most suitable for gainful employment in their current community and back home in Afghanistan. Options from TKF team were provided and were discussed in detail one by one. Criteria discussed were cultural suitability, employment opportunities for each skill, demand for each skill in local area and Afghanistan, benefit to refugee community from training such professionals, potential wage, etc. Input and expertise of Vendors, Distributors and Employers was used for satisfying these criteria as they had more exposure and experience with the open market. Points made in these discussions can be found below under the heading "Discussion of Trades with Vendors".
- Male FGD participants ranked tailoring, mobile-repairing, plumbing, auto-repairing(mechanic), electrician, welding as the skills that would be most likely to lead to gainful employment and felt it would also be practical

for gainful earning in Afghanistan. Female FGDs participants ranked Tailoring, Carpet-Weaving, Embroidery as skills that they would be able to practice (while following cultural and religious constraints) to earn a living.

- Female FGD revealed that many refugee women are skilled in traditional embroidery and carpet-weaving, however, their skills are limited and many cannot meet demands of the modern market (such as stitches and cuts being used in modern clothes).
- Furthermore, due to cultural reasons, women cannot venture out and create linkages in the market and are forced to use middlemen to sell their products. As a result of this, many women are consistently underpaid for their efforts.



Focus Group Discussion in Progress

Market Analysis of Trades with Vendor Input and Desk Review of Prior Studies (NRC, IDO and UNHCR):

The points raised by vendors, as mentioned above, were the basis on which FGD’s trade selection was done. Reference to additional studies is also cited where needed.

Trade	Scope in Quetta According to Currently Working Trade-specific Professionals (Vendors, Shopkeepers, Employees or Employers from Local Community)		Scope in Afghanistan
	Males		
Mobile-Repair*	A professional repairer in attendance indicated that demand and use of mobile phones was surging in Quetta and professional mobile-repairers with their own shop could easily find work paying 200-500 PKR per repair . With 50-75 repair-jobs per month as well as selling refurbished phones and services like downloading of songs/movies, he shared he was making in excess of 20,000-25,000 PKR per month .		Yes. According to NRC Market Assessment Survey, mobile repairing has scope in Hilmand, Lashkar Gah, Kandahar, Kabul, etc. regions of Afghanistan.
Tailoring*	Attendees indicated that employment on busy market like Abdul Sitar Road, Jinnah Road, Saryad Road, is generally available as tailors are usually under-staffed. Potential pay was in excess of 15,000 PKR for moderately skilled tailors , and 8000 PKR for apprentices . Self-employment by opening a shop in the local community would also be possible but would not earn as much unless near occasions like Eid.		Yes. According to NRC Market Assessment Survey, tailoring has scope in Hilmand, Lashkar Gah, Kandahar, Kabul, etc. regions of Afghanistan.

Plumbing*	Residents of Bashir Chowk, Kashmirabad, etc. frequently have to hire plumbers from other areas due to under-served local market. Work would be available in these areas if participants are willing to set up their own shop. Average earning of plumbers vary between 15,000-30,000 PKR depending on the work, location (whether it is a rich or poor community) and whether they work as assistant or own a shop.	Yes. According to NRC Market Assessment Survey, tailoring has scope in Hilmand, Lashkar Gah regions of Afghanistan.
Electrician*	A local builder in attendance at FGD indicated that he frequently hires electricians for local jobs. He may pay up to 5000 PKR for a single contract, in addition to the electrician's work on home visits and repairs of appliances for locals. Monthly earning of electricians he works with is 15,000+ PKR. Hiring of entry-level should be as assistants however until they are more skilled, due to the risky nature of work and liability for damages.	Yes. According to NRC Market Assessment Survey, electrician has scope in Hilmand, Lashkar Gah, Kandahar, Kabul, etc. regions of Afghanistan.
Welder	Information from currently working welders was not available. However, car-mechanic in attendance estimated a salary for a beginner at 12,000 PKR which may increase to 25,000 PKR and that local mechanic shop hubs regularly hire a few.	
Auto-mechanic*	Car-mechanic in attendance indicated that entry-jobs for mechanics are usually unpaid, and he would hire Afghans if skilled applicants. But a skilled and trained beginner assistant may start at 5000 PKR and grow his earnings in a few years to 20,000 PKR with experience and his own shop.	Yes. According to NRC Market Assessment Survey, electrician has scope in Hilmand, Kandahar, Kabul, etc. regions of Afghanistan.

***According to Market Assessment Report by IDO and UNHCR, Tailors, Mechanics, Electricians, and Mobile Repairers in Quetta (urban) are willing to hire Afghan refugees if skilled Refugees apply.**

Women

(Note: Due to cultural constraints, no male vendors could be invited to female FGDs. Women in FGDs were working through middle-men who sell their products to the market, both local and international. In this section, women who were already employed are consulted about their experience working with the vendors while working in these professions)

Tailoring**	Women who are currently employed as tailors shared that they receive orders through middlemen and fulfill them at home. They may receive 200-500 PKR for a suit that sells for 3000 PKR. Experienced tailors could get between 40-100 orders a month, and more near holidays.	
Carpet-Weaving**	Hand-made carpets are one of the one most demanding products to make while also being highly in-demand locally and abroad. Afghan women are considered experts at producing such carpets but the deals are made through middle-men and they are underpaid. A quality carpet takes one month to make and she may receive for it 8000-16,000 PKR. The eventual selling price may range from 25,000-100,000 PKR.	
Embroidery**	Traditional and modern embroidery of Balochistan is sold locally and abroad, but through middle-men. Different embroidery sells for very different prices and beginners should start as apprentice. An expert's work can earn 20,000 PKR per month.	

****According to NRC Market Assessment Report, the main issues facing employment of women are Cultural Taboos, religious factors, isolation, language, lack of opportunities. However, a popular way for people to get jobs is through close relatives, which women can take advantage of.**

Other findings to note from desk review of other reports was

- 1) The reasons that Afghan population gave for the amount that were employed. **NRC report noted that 51% feel that they are unemployed due to not having enough technical/vocational skills.**
- 2) Report by IDO/UNHCR, on the basis of market placement survey forms filled from vendors/skilled vocational persons, has recommended that the market can accommodate Skill-training students market on three terms:
 - 1- The skill learner must be an expert in his skill
 - 2- Should have a guarantee for trust
 - 3- Should have own tools

Based on this is recommended that basic necessary tools or equipment should be provided after training for market placement purpose.

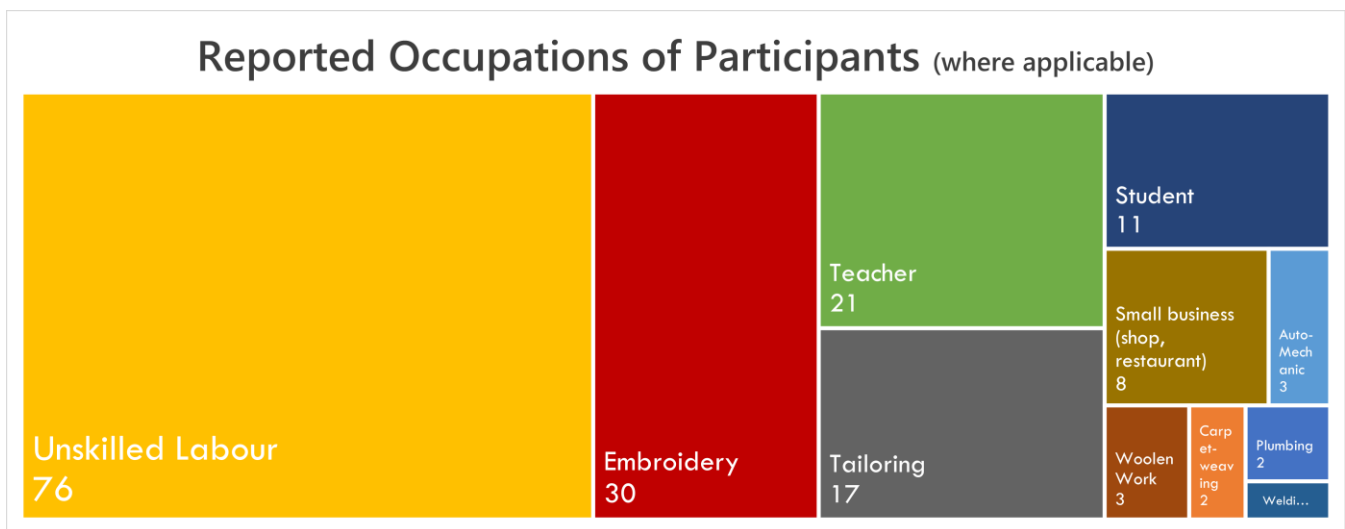
- 3) UNHCR PNA 2015 report notes that the provision of technical skills training with tool kits could encourage poor families to send their children to school as the tool kit could help them generate an income.
- 4) UNHCR PNA 2015 notes that women are engaged in livelihood activities more often in urban areas owing to the higher living expenses in urban settings. Many respondents in the PNA, especially women shared that they are keen to benefit from livelihood training opportunities. It seems that women are less reluctant to leave the house for income-generating activities that are available outside the house.

Survey Results and Findings

Current Occupation Status:

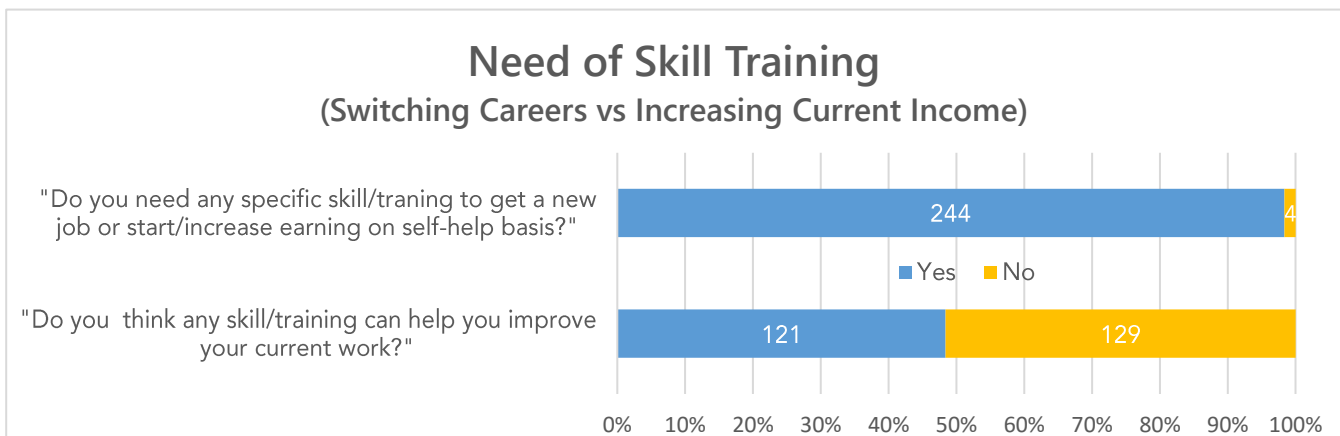
The majority of the participants, 67.1% (163) said that they were currently employed or working in some income generation activities while 33.6% (84) of participants said that they were unemployed. 11 additional participants were students, and also not generating income.

The 174 participants (including students) who reported that they were engaged in some sort of occupation were involved in a variety of different trades, which included unskilled labor, tailoring, teaching, small business owners (shops, restaurant), welding, auto-mechanic work, plumbing, woolen craftsmanship, etc. The distribution of answers is given in the tree-map below. The monthly earning of participants who were involved in these trade fell between PKR 4,000/- to 16,100- PKR, with lowest income being 4,000/- and two outliers earning above 20,000/PKR.



Demand Among Participants for Skill/Training to Increase Income:

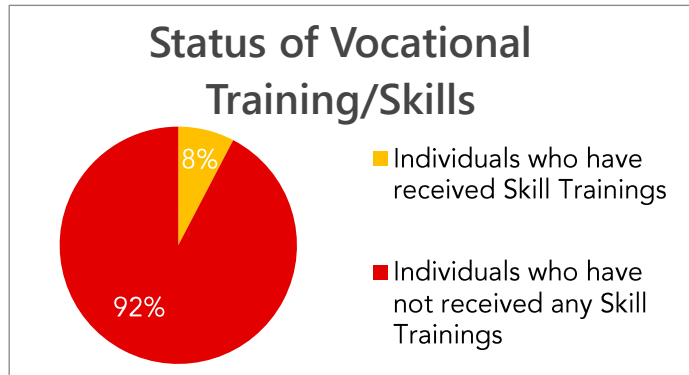
Responsiveness from community towards skill training for different purposes was assessed. Supplementing current income vs leaving their work for a new job. The results suggest that many refugees are dissatisfied with their current work. From 248 participants, an overwhelming majority of 98.3% (244) agreed that they needed some sort of skill training to start a new job or an income generation activity, only 1.7% (4) disagreed. The remaining four cited lack of opportunities which may be due to lack of knowledge. The response of the community towards receiving skill training being used to supplement their current income was much less enthusiastic, with only about half (48.7%) of



the same respondents reporting that they needed it. This may suggest that **many refugees have already maxed out their earning potential in their current occupation.**

Currently Received Vocational Training:

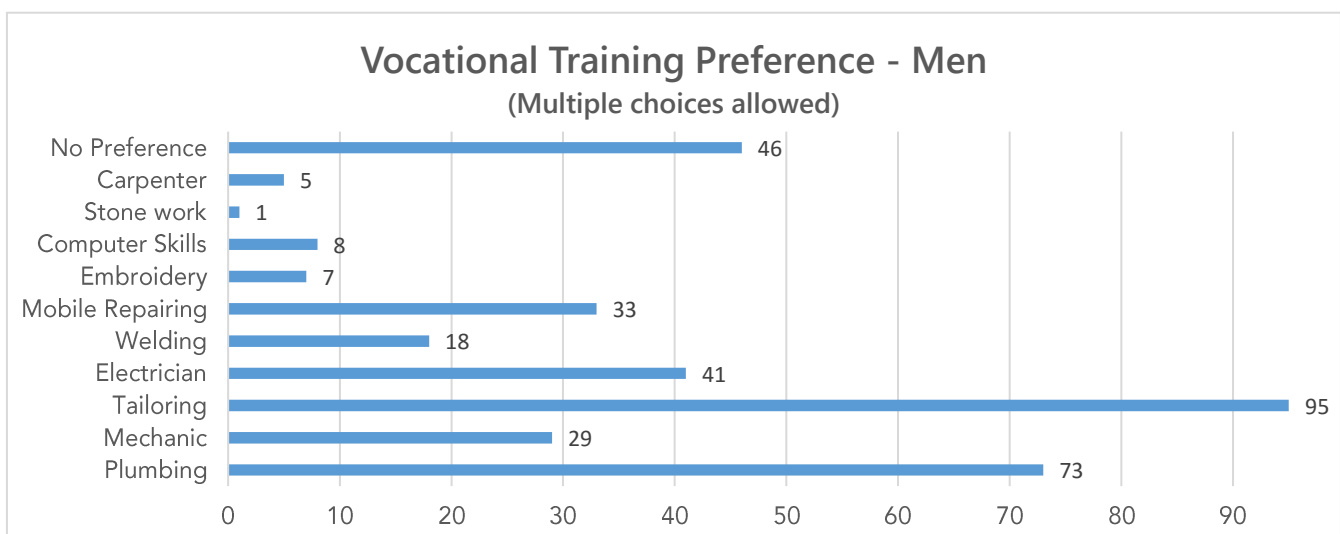
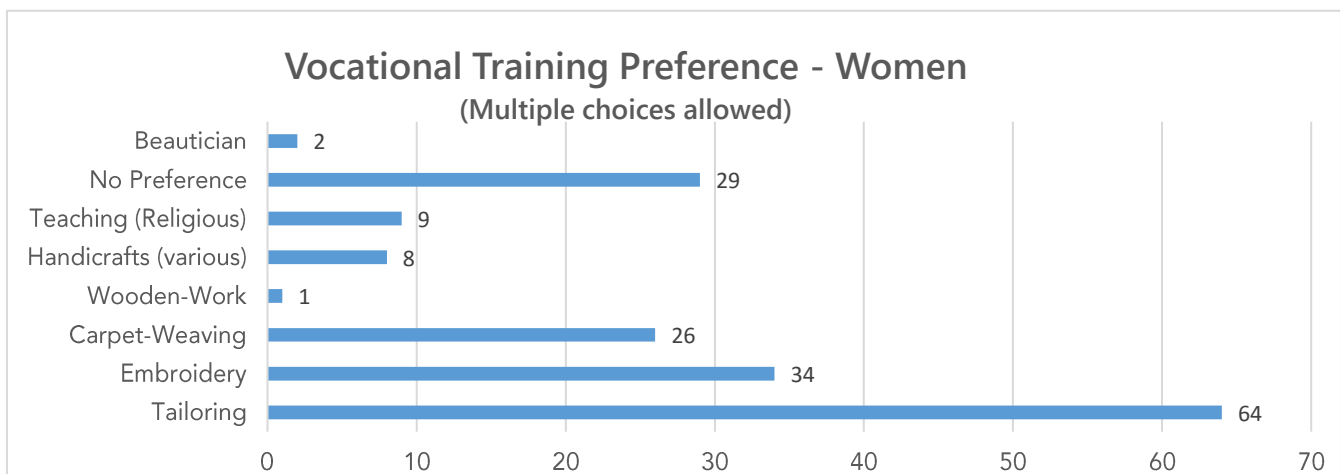
The vast majority of the participants (92.3% or 229) had never received any sort of skill/vocational training before, either formally or informally. Only 7.7% (19) respondent’s shared that they had received any vocational (formal/informal) training.



Most Preferred Skills/Trainings

When asking participants about the most wanted or demanded skills/trainings, **the women identified skills such as carpet-weaving, embroidery, tailoring.** Meanwhile, **the men wanted skills related to Mobile Repair, Plumbing, Tailoring, Mechanic, Welding, Electrician.**

A large portion of participants reported that they had no preference for which skill trainings they received.

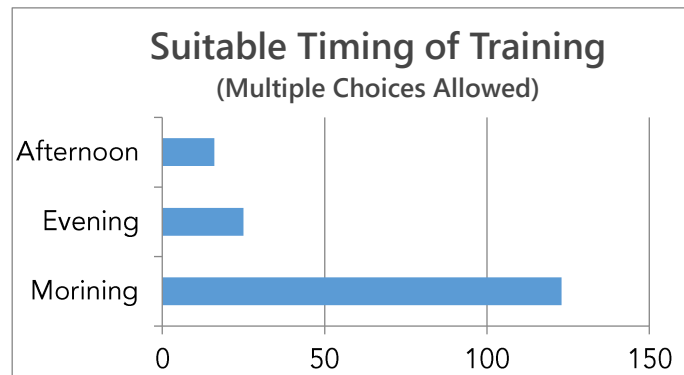


Agreement of the Individuals on the Skills/Training if Offered:

It was also important to know if the targeted population would agree to take active part in the skill training if offered. The questionnaire thus asked if participants could make time for a 4-6 month training period. **About two-thirds of the participants 66% (164) indicated that they were fully agreed to the skill trainings for the time period if offered.** Whereas rest of the individuals said that it would not be easily possible for them to take part in the skill training program if offered on regular bases.

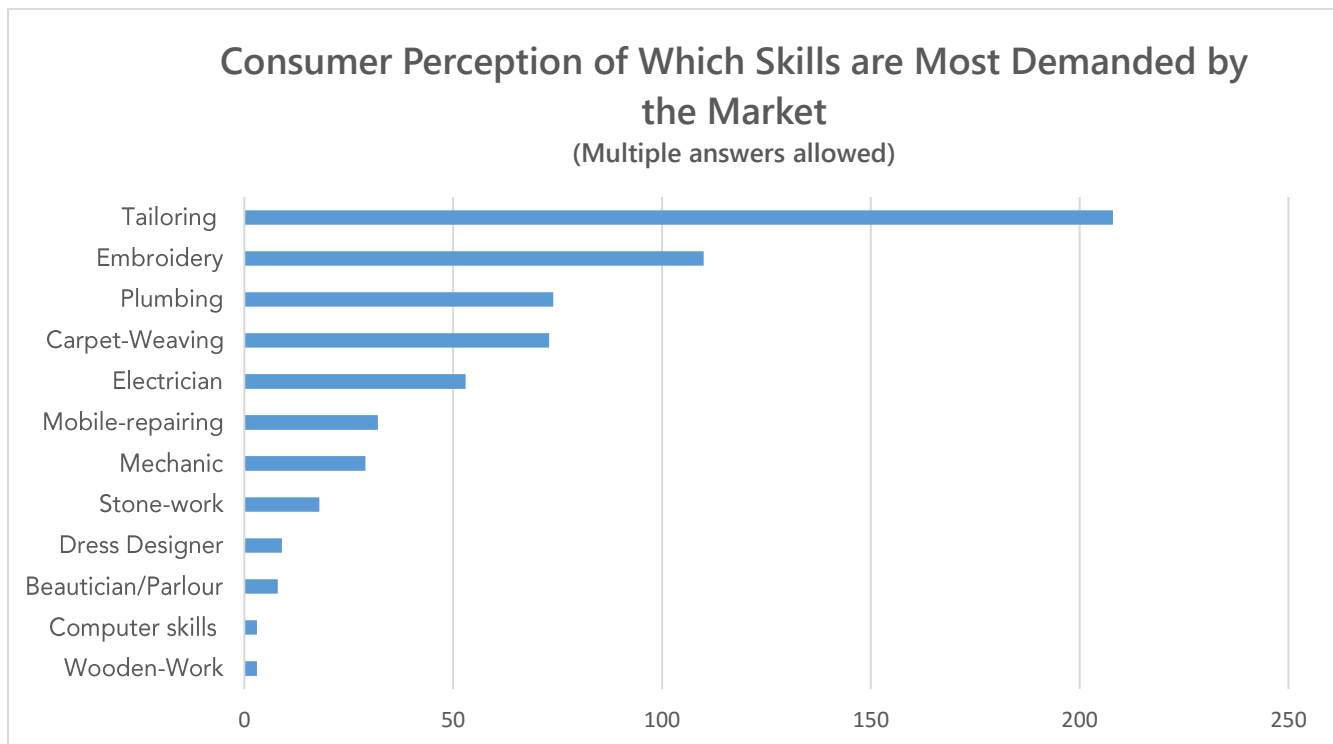
Timing and duration of the Trainings:

Out of the 164 individuals who shared that they would be willing to undertake training, 125 respondents (75% of the 164 willing individuals) said that Morning was a suitable time for them. 15% (25) individuals preferred Evening while 10% preferred Afternoon for the training.



Perceptions of Consumers about the most in-demand skills

As the refugees also represent consumers for the intervention area market, they were asked about their opinion on what trades that their community most demanded. The below table illustrates their answers.



Conclusions and Recommendations:

In the light of key informant interviews and analysis of secondary data, following are the recommendations from study team;

- **Male FGDs participants ranked tailoring, mobile-repairing, plumbing, auto-repairing(mechanic), electrician, welding as the skills that would be most likely to lead to gainful employment and felt it would also be practical for gainful earning in Afghanistan. Please see findings of FGD vender discussions and desk review for detailed reasoning.** Results of survey also indicated agreement with these offered trades, with only a few choosing secondary trades.
- **Female FGDs participants ranked Tailoring, Carpet-Weaving, Embroidery as skills that they would be able to practice (while following cultural and religious constraints) to earn a living in both current area and Afghanistan. Please see findings of FGD vender discussions and desk review for detailed reasoning.** Results of survey also indicated agreement with these offered trades, with only a few choosing secondary trades.
- Similarly, to earlier projects, **trainees should be given a stipend that should be good enough to meet the trainees' needs during the training program.**
- It is recommended that **basic necessary tools or equipment should be provided after training** for market placement purpose.
- **The skill-training sessions should be conducted in mornings**, in line with preference of willing beneficiaries.
- Community youth and adults have very few skills and little education. **Many in the community want to leave their current jobs** and feel that it's earning potential will not increase in the future, **especially those who are reliant on unskilled labor**, which is often under-paid and is not a reliable means of income year-round. The vast majority desire to undertake skills training which will allow them to avail new economic opportunities.
- Even if the community is eager to learn, **a significant portion (one-third) face difficulty in sparing 4-6 months to learn such a skill.**
- Female beneficiaries especially are often skilled in traditional skills such as embroidery which are commonly taught by elder members of family. However, these skills do not satisfy needs of the modern market fully. **Women's existing skills should be used as a foundation to engage women successfully in vocational training program.**
- **Creating market linkages is necessary for beneficiaries. Especially for women** as they are constrained from conducting their own business and are currently forced to deal through middlemen who under-pay them for their efforts. Male beneficiaries and youth as well also lack experience to get the proper earned value of their skills in the market. Therefore, the project will aim to develop strong market linkages of targeted trainees with different employers.
- **Due to cultural constrains and mobility of women, community-based centers should be used.** Female trainees cannot come out of their residential premises so it shall be insured that females are provided in house or community-based trainings with female instructors.