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Southern Sudan Data Gap Analysis for Country Analytic Report

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Southern Sudan

Data Gap Analysis for Country Analytic Report

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Sponsored by the Economic Growth office of USAID's Bureau of Economic Growth, Agriculture and Trade (EGAT) under Contract No. PCE-I-00-00-00013-00, Task Order 004, the Country Analytical Support (CAS) Project, 2004–2006, Nathan Associates Inc. developed a standard methodology for producing analytical reports to provide a clear and concise evaluation of economic growth performance in designated countries receiving USAID assistance. The reports are tailored to meet the needs of USAID missions and regional bureaus for country-specific analysis. Each report contains

- A synthesis of key data indicators drawn from numerous sources, including the World Bank, the International Monetary Fund, the Millennium Challenge Corporation, the United Nations, other international data sets, and host-country documents and data sources;
- International benchmarking to assess country performance in comparison to similar countries, groups of countries, and predicted values based on international data;
- An easy-to-read analytic narrative that highlights areas in which a country's performance is particularly strong or weak, to assist in the identification of future programming priorities; and
- A convenient summary of the main findings, in the form of a Highlights Table and a Performance Scorecard (in lieu of an Executive Summary).

Under Contract No. GEG-I-00-04-00002-00, Task Order 004, 2006-2008, Nathan Associates continues to provide support to the EGAT Bureau by producing analytical reports evaluating economic growth performance in designated host countries. Through the same task order, Nathan is also developing a special template for countries emerging from crisis, assessing data issues in countries with large gaps in their data; conducting in-depth sector reviews based on the diagnostic analysis in the country reports; and providing other analytical support to the EGAT Bureau.

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Subject to EGAT consent, electronic copies of reports and materials relating to the CAS project are available at www.nathaninc.com. For further information or hard copies of CAS publications, please contact:

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Southern Sudan: Data Gap Analysis for Country Analytic Report

INTRODUCTION

Country analytic reports for post-conflict countries provide missions and regional bureaus with a concise evaluation of key indicators covering a broad range of issues relating to economic growth and recovery. The reports draw on a variety of international data sources¹ and use international benchmarking against reference group averages, comparator countries, and statistical norms to identify constraints on, trends in, and opportunities for strengthening growth and fostering peace and stability. Similar to the analysis developed under the *Country Analytical Template* (April 2005), the analysis in a post-conflict report is organized around two mutually supportive goals—sustainable growth and poverty reduction—but it is adapted to post-conflict recovery settings.² Sustaining peace, reducing poverty, and achieving economic growth are goals influenced by many elements measurable in terms of population growth, public provision of education and health services, job creation and workforce development (especially among youth), demographic composition, agricultural development, and progress toward gender equity. In general, countries affected by conflict have weak government capacity, minimal private sector activities, weak or damaged infrastructure, and a population living in uncertainty, sometimes fleeing war-torn regions.

Transformational growth requires a high level of investment and rising productivity, which themselves require a strong *enabling environment for private sector development* involving multiple elements: macroeconomic stability; a sound legal and regulatory system, including secure contract and property rights; effective control of corruption; a sound and efficient financial

¹ Sources include the most recent data from the World Bank, the International Monetary Fund, the Millennium Challenge Corporation, the United Nations (including the Millennium Development Goals database), the World Economic Forum, other international data sets, and accessible host-country/proteCTORATE documents and data sources.

² In USAID's white paper *U.S. Foreign Aid: Meeting the Challenges of the Twenty-first Century* (January 2004), transformational growth is a central strategic objective, both for its innate importance as a development goal and because growth is the most powerful engine for poverty reduction.

system; openness to trade and investment; sustainable debt management; investment in education, health, and workforce skills; infrastructure development; and sustainable use of natural resources.

In turn, the impact of growth on poverty depends on policies and programs that create opportunities and build capabilities for the poor. We call this the *pro-poor growth environment*. Here, too, many elements are involved, including effective education and health systems, policies facilitating job creation, agricultural development (in countries where the poor depend predominantly on farming), dismantling barriers to micro and small enterprise development, and progress toward gender equity.

In accordance with this conceptual framework, the economic performance assessments are in three sections: Economic and Conflict Status, Private Sector Enabling Environment, and Pro-Poor Growth Environment. Table 1 summarizes the topic coverage.

Table 1
Post Conflict Economic Performance Assessment Topic Coverage

Economic and Conflict Status	Private Sector Enabling Environment	Pro-Poor Growth Environment
<ul style="list-style-type: none"> • Economic growth in post-conflict recovery • Poverty and inequality • Economic structure • Demography and environment • Gender 	<ul style="list-style-type: none"> • Economic stabilization and government capacity • Business environment • Financial sector • External sector • Economic infrastructure 	<ul style="list-style-type: none"> • Health • Education • Employment and workforce • Agriculture

Nathan Associates has prepared this paper for the EGAT/EG office in Washington D.C. in response to a request from the CTO to determine whether or not a post-conflict country analytic report is feasible for Southern Sudan based on available data. As USAID looks to advance its economic growth programs in Southern Sudan, such a report would be of great value to the mission.

For the purposes of USAID economic growth programs in Sudan, Nathan Associates has proposed that Southern Sudan be the sole focus of any analytical report. USAID funding for economic growth programs in Sudan are allocated entirely to Southern Sudan, and operationally programs for Southern Sudan have been largely separate from USAID activities in other parts of the country. Any analysis of economic performance at the national level would have little relevance for USAID's economic growth programs concentrated exclusively on the South. Hence, the following analysis of data gaps focuses on the availability of data for Southern Sudan as a distinct entity. So far, it appears that very little valid quantitative information is available for the South. This report reviews current data and the potential for future data availability, and provides recommendations for alternatives (e.g., other than a typical CAS report) for conducting an economic growth performance assessment for Southern Sudan.

DATA AVAILABILITY FOR SOUTHERN SUDAN

All standard international sources report data for Sudan as a whole. Data for Southern Sudan are, for the most part, non-existent. The CAS template for post-conflict countries uses a set of standard indicators selected on the basis of their validity and their usefulness in benchmarking. Data sources for those indicators include the World Bank, IMF, UNDP, Ministries of Finance, central banks, and ministries of planning. As Table 2 shows, statistically significant data for Southern Sudan are severely lacking.

Table 2

Current and Potential Data Availability on Southern Sudan for Each CAS Topic

CAS Topic	Availability as of November 2007	Potential Availability (next 2-3 years)
Overview of the Economy	Very Little	
Conflict status	<ul style="list-style-type: none"> Qualitative and quantitative data are available. Some CAS indicators are available: <ul style="list-style-type: none"> Episode of significant violence (latest) Type of conflict (latest) Magnitude of conflict (latest) Refugees/IDPs per capita 	Uncertain
Growth performance	<ul style="list-style-type: none"> Quantitative data are available for Sudan. <i>Best estimates</i> for Southern Sudan are available for GNI per capita (\$90). CAS indicators are not available. 	Uncertain
Poverty and inequality	<ul style="list-style-type: none"> Qualitative information available. <i>Best estimates</i> available for percent of population living on less than \$1 per day. Other CAS indicators are not available. 	This data should be available in 2008 and 2009 depending on completion of the census. The production of a PRS could also bring forth this information for the South.
Economic structure	<ul style="list-style-type: none"> Qualitative information may be available in the field. CAS indicators are not available. 	The official census should provide some of this data.
Demographic and environmental conditions	<ul style="list-style-type: none"> Qualitative information available in the field. <i>Best estimates</i> available for population size, population growth rate, and for size of IDP and refugee population. Other CAS indicators are not available. 	The official census should provide some of this data.
Gender	<ul style="list-style-type: none"> Gender-specific data are available in the Household Survey <i>Best estimates</i> available for some indicators. CAS indicators are not available. 	This data should be available in 2008 and 2009 depending on completion of the census.
Private Sector Enabling Environment	Very Little	
Economic stabilization and government capacity	<ul style="list-style-type: none"> Government of Southern Sudan budget estimates available. Some CAS indicators (estimates) available. 	USAID budget assistance may provide quantitative data.
Business environment	<ul style="list-style-type: none"> Qualitative information available. 	Uncertain

CAS Topic	Availability as of November 2007	Potential Availability (next 2-3 years)
	<ul style="list-style-type: none"> CAS indicators are not available. 	
Financial sector	<ul style="list-style-type: none"> The South does not have an official financial sector as the two main banks are in the north. CAS indicators are not available. 	In principle this data is attainable given that there are only two banks, yet so far disaggregated data have not been reported.
External sector	<ul style="list-style-type: none"> Some figures are available for aid through the Sudan Consortium as well as through Government of Southern Sudan budget estimates. CAS indicators are not available. 	Uncertain
Economic infrastructure	<ul style="list-style-type: none"> Qualitative information available CAS indicators are not available. 	Uncertain
Pro-Poor Growth Environment	Some	
Health	<ul style="list-style-type: none"> Household Health Survey Some CAS indicators available: <ul style="list-style-type: none"> Child mortality rate Maternal mortality rate Access to improved sanitation Access to improved water source 	The official census should provide some of this data.
Education	<ul style="list-style-type: none"> Household Health Survey One CAS indicator available—net primary enrollment rate 	The official census should provide some of this data.
Employment and workforce	<ul style="list-style-type: none"> Qualitative information available. CAS indicators are not available. 	The official census should provide some of this data.
Agriculture	<ul style="list-style-type: none"> The Ministry of Agriculture with the FAO may have relevant data, but it is not available on the internet and may be available only in the field. CAS indicators are not available. 	The official census may provides some quantitative data, but not the value-added indicator that is typically used.

Note: A complete list of indicators for each topic is provided in the appendix.

Valid data for Southern Sudan are lacking on nearly all established CAS indicators. Still, some quantitative and qualitative data are available. The most comprehensive—though less than ideal—source of data is *Towards a Baseline: Best Estimates of Social Indicators for Southern Sudan*, a statistical report published in 2004 by the New Sudan Centre for Statistics and Evaluation (NSCSE) with support from UNICEF. The report’s analysis consists of “model-based assumptions” for missing data. At best, the report can be considered a “scenario-based set of estimates.”³ It covers demographics, primary education, child and maternal mortality, child and women’s health, water and sanitation, child workers, per capita Gross National Income (under \$90), and poverty incidence (around 90 percent). The data from the report provided the basis for an interim report in December 2004 on progress, or lack thereof, on the achievement of

³ The report is available at <http://www.reliefweb.int/rw/RWB.NSF/db900SID/KHII-6365Q7?OpenDocument>.

Millennium Development Goals in SPLM-controlled areas of Southern Sudan.⁴ Though the report's estimates are widely used, they will soon be obsolete given the lack of statistically sound data and the lack impending efforts to acquire such data, making the report a less than ideal source for a CAS report.

The most relevant source of statistically sound data is the Health and Household Survey. In 2006 the Central Bureau of Statistics, the Ministry of Health of the Government of Southern Sudan, and the Southern Sudan Commission for the Census, Statistics and Evaluation (SSCCSE)⁵ conducted the Sudan Household Health Survey (SHHS). The survey covered all 25 states; the SSCCSE was responsible for covering the 10 states of Southern Sudan. The SSCCSE website states that the information from this survey should have been available in March 2007; however, results have yet to be officially published. What is available is a presentation on the survey delivered at the Sudan Consortium Meeting II on March 19-20, 2007.⁶ The presentation provides statistical data for several Millennium Development Goals indicators under health, education, gender equity, and environmental sustainability. Information for each indicator is disaggregated by state, thus it is possible to do an analysis specifically on the South for these indicators. At the very best, however, the HHS information that has been released fulfills requirements for only a handful of the indicators for health and education.

The Joint Assessment Mission (JAM), which consists of the World Bank, UN, IMF, and the Government of Sudan, is leading efforts to gather data and information.⁷ In 2005 JAM published a comprehensive review of conditions in Sudan and a separate analysis of the South. One of the nine "clusters" for rehabilitation is "information and statistics." Recognizing that valid data and statistics are fundamental in informing policy and programming and in fostering accountability, JAM aims to improve the availability and quality of information disaggregated by region, ethnic group, gender, and age by 2011. It is implementing a clear statistical information strategy for which projected outputs include a population census (2008), a participatory poverty assessment, a household budget survey, an agricultural census, and a labor force survey.

Under the NSCSE, the UN Office for the Coordination of Humanitarian Affairs (UN OCHA) launched STARBASE, the Sudan Transition and Recovery Database, which compiled information provided by NGOs and NCSCSE on population, health, food deficits and malnutrition, primary enrollments, sorghum prices, and access to water and latrines. The information, however, consisted largely of estimates based on a limited range of observations. With the support of the

⁴ <http://ssccse.org/blog/files/MDGs%20Interim%20Report%20for%20Southern%20Sudan%202004.pdf>

⁵ In 2003, the SPLM established the New Sudan Centre for Statistics and Evaluation (NCSCSE). In 2005 the NSCSE was re-established under Government of Southern Sudan as the Southern Sudan Commission for the Census, Statistics and Evaluation (SSCCSE). SSCSE's website provides relatively good information on the its intended activities: <http://www.scccse.org/blog/node/15>

⁶ The presentation is available through the World Bank Sudan site: <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/SUDANEXTN/0,,contentMDK:21306759~menuPK:3699214~pagePK:141137~piPK:141127~theSitePK:375422,00.html>

⁷ www.unsudanig.org/JAM

US Census Bureau, SSCCSE intends to conduct a census in February 2008.⁸ When the census data will be published is yet to be determined.

Information from government sources is available in the form of budget estimates for the Government of Southern Sudan. While such estimates are informative, they are not very sound. USAID is working closely with the government on developing a sound budget. The central bank does not disaggregate statistics by region, but could do so in the future, allowing for sound analysis of the monetary environment and financial sector. Given that more accurate data are in the pipeline, conducting an analysis based on unsound estimates is not ideal at this time.

ALTERNATIVES TO THE CAS FRAMEWORK

The data limitations for Southern Sudan make it impossible at this time for the CAS team to produce a typical post-conflict country analytical report. Both the Government of Southern Sudan and the donor community have made improvement in information and statistics a priority, so in the near to medium term more data may become available. Until then, we propose two alternative analysis that could support the mission's objectives in Southern Sudan.

Option 1—CAST Analysis

Using Fund for Peace's (FFP) Conflict Assessment Tool (CAST), the CAS team can produce a special compilation of information on economic, social, and political aspects of the conflict situation in Southern Sudan. FFP could customize the assessment by applying terms especially relevant for Southern Sudan. This analysis would be produced as a standalone report. A full CAST analysis would require an LOE allocation of 3 days of Level I expertise and 5 days of Level II expertise.

Option 2—Field Study

The documentation available on Southern Sudan shows that data development is still in its early stages. It also appears that much more information may be available in the field. Examples include FAO data on agriculture, results from the recent health survey, and more detailed information on education. Hence, a CAS-funded field visit (with mission backing to ensure that the field team can gain access to Government of Southern Sudan and donor project offices) would almost certainly yield a more complete and up-to-date statistical picture of conditions relating to economic growth programming in the region. This field study would concentrate on specific sectors of interest for the mission such as economic infrastructure, business enabling environment and private sector competitiveness, the financial sector, and agriculture. Given that other projects focusing on macroeconomic reforms exist, we expect that the field study would focus mainly on private sector development. A full field study would require an estimated LOE allocation of 2 weeks in-country and 1 week in the home office of Level I expertise.

⁸ Based on recent news reports from Southern Sudan. <http://www.k2-media.org/jubapost/go/record.php?cat=6&recordID=283>