Cash-based Programmes and Conflict:
Key areas of interaction and options for conflict-sensitive programming in South Sudan

Research conducted in Central Equatoria, Southern Unity, and Lakes States
February - March 2018

This research was conducted by Dr. Edward Thomas, Ranga Gworo of the Conflict Sensitivity Resource Facility (CSRF) and Kiden Grace Wani of the World Food Programme (WFP) in February and March 2018, and funded by the UK, Swiss, Canadian and Netherlands Donor Missions in South Sudan. This paper has benefited substantially from comments and corrections from Catherine Dom, Julie Halding, Dan Maxwell, Malcolm Smart, Simon Rynn, an anonymous reviewer, and members of the Cash Working Group.

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CSRF
Conflict Sensitivity Resource Facility
SOUTH SUDAN

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Acronyms

CES	Central Equatoria State
CID	Criminal Investigative Department
CSRF	Conflict Sensitivity Resource Facility
DFID	Department for International Development
EES	Eastern Equatoria State
EU	European Union
FAO	Food and Agriculture Organisation
GDP	Gross Domestic Product
GESS	Girls Empowerment in South Sudan
IMF	International Monetary Fund
M&E	Monitoring and Evaluation
NBG	Northern Bahr el Ghazal
NGO	Non-Governmental Organisation
POC	Protection of Civilians
SPLM	Sudan People's Liberation Movement
SPLM-IO	Sudan People's Liberation Movement in Opposition
SSP	South Sudanese Pound
UN	United Nations
UNS	Upper Nile State
USD	United States Dollar
WBG	Western Bahr el Ghazal
WES	Western Equatoria State
WFP	World Food Programme

Executive Summary

Cash-based programmes can help poor households address food insecurity, and to better manage by themselves some of the risks they face. Evidence from around the world suggests that this assistance approach can be implemented successfully in conflict-affected societies. In South Sudan, cash-based programmes include conditional and unconditional cash transfers, grants, bursaries and work schemes where beneficiaries receive financial resources in cash or vouchers which can be exchanged for goods in the local markets. These programmes are changing aid delivery, and the social context, towards new systems structured around local markets and local currency.

Cash-based programmes may interact with South Sudan's conflicts, by channelling resources into the war economy, or burdening markets with demand which they cannot meet, or even by putting beneficiaries at risk of predatory violence. Cash-based aid also may impact traditional kinship and social safety networks. This study looks at how these interactions between cash-based programmes and conflict in three main areas:

- exchange rates, commodity prices and the macro-economy;
- financial services, trade and the checkpoint economy; and
- local systems of production and exchange, including influence on kinship, markets, gender and ethnicity.

Exchange rates, commodity prices and the macro-economy

Official and unofficial armed actors tax and expropriate goods and cash travelling on South Sudan's roads and rivers. **The widespread checkpoint economy has become the main arena for interaction between the humanitarian system and conflict.** As an example, in February 2018, the UN Mission in South Sudan said that 66 checkpoints had been counted on the 1,028-kilometre road from Juba to Bentiu.[1] Humanitarian agencies largely outsource these risks and costs to transport companies. Relief grain and other forms of in-kind assistance are delivered through the checkpoint economy – but unexpectedly, a significant component of cash-based programmes also has to deal with checkpoint constraints. New financial service providers deliver goods across the country, generating profits in South Sudanese pounds in local markets. Instead of physically transporting those profits to the capital, they contract local traders to pay them out in cash-based programmes, reimbursing them in Juba with dollars from humanitarian agencies financing the cash-based programmes. **Financial service providers have developed an infrastructure that brings together the interests of humanitarian agencies, traders and beneficiaries, and this infrastructure is likely to grow in importance.**

Trade is also growing in importance: most South Sudanese families now depend on markets for most of their food – even though cash often eludes them (see Annex 1). This contradiction structures South Sudan's social crisis and expands the scope of the market. Trade finances checkpoints and trade systems are caught up in the conflict. For example, on the White Nile trade corridor, many Dinka traders supply Nuer areas associated with the opposition, because Dinka traders can manage checkpoints more easily. But such **ethnicised trade systems may create incentives for alliances between transporters and checkpoint personnel.**

The differential between official and parallel exchange rates is large, and conflict actors in official positions can profit from this differential, potentially investing profits in the conflict. Cash-based programmes aim to situate spending in country, and they change foreign currency at official rates, so that **any expansion of cash-based programmes also increases the funds moving through the traders and transporters that have to directly engage with the war economy to implement delivery of assistance to beneficiaries**. Cash-based programmes also aim to replace relief food with food commodities. For the past five years, the period when cash-based programmes took off in South Sudan, global commodity prices have been declining. But cash-based programmes run the risk of exposing South Sudan households more directly to food price volatility in local markets, rather than leaving international aid agencies to manage that volatility through their systems of procurement and targeting.

Changing patterns of risk: Cash-based and in-kind programming

Both cash-based programmes and in-kind programmes interact with the war economy, configured around exchange rate policies and checkpoints, but they interact in different ways. Cash-based programmes may already be large enough to figure visibly as part of the country's gross domestic product. **Cash-based programmes are implemented in local currencies and directly engage with local markets. Any expansion is expected to impact the market economy, increasing opportunities for the markets to expand and strengthen, creating new winners and new losers.**

Cash-based programmes and local systems of production and exchange

Cash-based programmes that support household food security and livelihoods also interact with local systems of production and exchange, which are being transformed by displacement and the rapid spread of market relations. Markets are changing kinship structures, around which many traditional forms of production and exchange are based. People uprooted from kin and land are not always able to produce goods and services which allow them to function in a market economy, and they need to improvise new coping strategies. Some of these strategies may be socially damaging and some will have implications for gender roles and inter-ethnic relations. At the same time, traditional systems of exchange, agriculture and livestock economies all used kinship structures to function, and market systems are now being drawn into the contradictions of a conflict-affected society.

Cash-based programmes are part of a long historical process which is moving people from economic systems structured around kinship to systems structured around the market. This process brings new opportunities, including for displaced households to be involved in income generating activities including trade. But as economic and political circumstances require people to buy food, rather than to grow it, many people adopt negative strategies, such as looting and extortion, to get the money which they now need to eat. **Cash-based programmes may not be able to effectively mitigate all the risks attendant on the shift from kinship to markets, but they need to be alert to potentially harmful pressures on household food production and predatory trade practices, as cash-based programmes become more widespread**.

Recommendations

Additional research supporting better and deeper learning

- **Cash-based programmes require an astute reading of food security, economic and other data. Donors should consider commissioning political economy analyses that can better support cash-based programmes.** Cash-based programmes for food security and livelihoods needs an astute reading of the shift from economic systems structured around kinship to systems structured around the market. This shift is difficult for outsiders to understand. A South Sudanese university could be supported to develop and implement a longitudinal programme that would be able to track and analyse these changes over time, in places representative of a wide range of South Sudan's diverse local economies and societies, would be of significant enduring value to South Sudan decision makers, including economists and the assistance community. An example of what this could look like can be seen at www.ethiopiawide.net, although this is not sector / topically based.[2]

- **Cash-based programmes affect gender and generational politics, but more sensitive understandings of social change are needed.** A South Sudanese-led research programme would help to promote positive gender and generational politics through programming.

- **Donors and humanitarian agencies need a better understanding of the checkpoint economy, and should ensure a modality is in place for accurate reporting and assessment of its impact on cash-based (and in kind) programmes**. Nearly all the actors involved in cash-based programmes outsource risk to transport companies. Donors and humanitarian agencies may be reluctant to scrutinise those risks, for fear that this might affect their reputation or their fiduciary commitments.

Supporting more effective programming

- **Increases in cash-based programming should be incremental and matched with robust mechanisms for monitoring and learning.** While there are many compelling reasons to continue to invest in cash-based programming, expansion and investment should be informed by ongoing analysis and evaluation.

- **Donors and implementers should seek ways to build in better data collection and analysis.** Currently data is collected by implementers mainly through market assessments and post distribution monitoring. Not enough market analysis is done, shared, or built upon. A stronger and consistent institutional approach including supply chain analyses, implemented through the Cash Working Group would be useful, but would need to be resourced.

- **Monitoring & Evaluation (M&E) should include indicators or approaches to measure social impacts**; this would benefit from support from an anthropologist or social scientist.

- **Explicit or implicit assumptions regarding programme impacts on increased local production, trade flows, inflation, contributions to local livelihood strategies and/or increased beneficiary vulnerability to market pricing fluctuations need to be investigated**. That would include developing a better understanding of patterns and systems for wealth distribution and money flows into and out of local economies, including role of local, regional and national level traders during programme design as well as implementation.

- **Lessons learned and best practices, at both a strategic and implementation level, should be captured and shared**, probably through the Cash Working Group.

- **Cash-based programmes should be more flexible in defining beneficiaries**, including more openness for recipients to transfer their entitlements to those they indicate. When using biometric registration, more family members should be registered for each family in case the family lead is away. This may help to avoid undermining kinship ties.

- **Cash-based programme practitioners should take into account the generational and gender differences in targeting**, including older women burdened with agricultural responsibilities. Targeting should be transparent and should be accompanied by effective complaint mechanisms, as well as monitoring acceptance levels of non-beneficiaries.

- **Implementers should seek to collectively bargain for better exchange rates from financial service providers.** Joint negotiations may allow implementers to reduce the space for rent-seeking.

- **Cash-based programmes should be alert to tensions between traders who are in competition over inclusion in cash-based programme contracts.** Cash-based programmes should organise regular review and re-selection of traders and beneficiaries for its activities, especially if it has begun receiving complaints. Cash-based programmes should have a credible and visible complaint mechanism in place, from the outset of the programme.

- **Cash-based programmes should interact with interlocutors and gatekeepers carefully.** Cash-based programmes may unintentionally allow these gatekeepers to manipulate the cash-based programme system for themselves or a specific group of traders, or even the implementing agencies' staff.

- **Humanitarians should receive induction training on local concepts of vulnerability and social systems**.

- **Cash-based programmes should be designed with longer term horizons to enable more learning and course correction**, and should have incentives or processes built in for collaborating and sharing information**.**

Cash transfers help poor people in crisis buy food and pay for basic services. Over the past two decades, humanitarian agencies and their donors have built a consensus around the utility of cash-based programmes in helping poor households to address food insecurity and social vulnerability, and to better manage the risks they face more autonomously and directly. Most humanitarian assistance is still delivered in-kind, but cash-based programmes are expanding rapidly: in 2004, cash-based programmes accounted for less than one percent of the total value of humanitarian spending: in 2016, they accounted for about six percent.[3]

Cash-based programmes, like other forms of humanitarian assistance, can be diverted to corrupt or violent areas of the economy, and aggravate conflicts. In weak markets, cash transfers can have destabilising inflationary effects. A succession of recent studies has found that cash-based programmes can be successfully implemented in conflict-affected societies and predatory political economies. These studies often address specific risks such as diversion, corruption, mis-targeting, inflation or gender relations, and conclude that cash transfers may pose new risks, but that these risks are manageable and are not unique to cash-based programmes. One weakness of these studies, however, is that they present markets as neutral or rational spaces and money as a neutral or rational means of exchange or store of value – without looking at the potentially violent social processes that are needed to create them.[4]

Cash-based programmes in South Sudan

Most humanitarian aid in South Sudan is delivered in kind, not in cash. Because cash-based programmes are spread across different agencies and clusters, it is not easy to work out their total value, though it is clear that it is increasing. For example, the value of the World Food Programme (WFP) humanitarian cash transfers (via vouchers) rose from USD 1,324,038 in 2014 to USD 24,502,408 in 2017.[5] The inter-agency Cash Working Group, led by WFP and Danish Church Aid, calculates that cash-based programmes amounted to USD 78.1 million, or about 10.7 percent of the total funding requirement requested in South Sudan's 2018 Humanitarian Response Plan. In 2017, cash-based programmes amounted to about USD 40 million, or about 8 percent of the food security and livelihoods cluster budget requirement.[6] Other major cash-based programmes include the World Bank's cash-for-work programme, which is worth USD 21 million from 2014 to 2018. DFID provides grants for schools and cash bursaries for schoolgirls and the EU provides salary payments for teachers, part of multi-year commitments to education worth about USD 100 million.

In 2015, the Cash Transfer and Markets Working Group published a table showing the wide variation in cash transfer values and conditionalities across the country.[7]

Cash transfers by location, conditionality and transfer value, 2015

Location	Programme	Transfer value
Juba	Vouchers	150 SSP/month
Upper Nile	Cash for work	10 USD/day, up to 10 days a month
Upper Nile	Cash for work	32 SSP/day, up to 25 days
Western Equatoria	Cash for work	20 SSP/day, up to 15 days a month
Warrap	Cash for work	30 SSP/day, up to 20 days a month
Upper Nile	Unconditional cash transfer	100 SSP/month for six months
Lakes	Unconditional cash transfer	180 SSP as needed
Warrap	Unconditional cash transfer	45 SSP/month
Jonglei	Unconditional cash transfer	500 SSP/month

This wide variation suggests that cash-based programmes are being improvised locally, but they are collectively changing the way aid works in South Sudan. Conditional and unconditional cash transfers, grants, vouchers and work schemes are reworking shelter, food security and livelihoods programmes – and they are also changing the social context in which these programmes operate. Cash bursaries and direct salary payment schemes for students, teachers and health workers are maintaining key social services at a time when donors are reluctant to finance those services through government counterparts and thus, may be influencing the relationships between citizens and the state and between government employees and the administration.

In South Sudan, and elsewhere, cash-based programmes have multiple aims. They aim to help beneficiaries to maintain spending on food, health and education in lean periods, and help them avoid debt or asset sales. But they go beyond the relief of hunger and poverty. Some cash-based programmes, like cash-for-work and cash for assets, aim to instil labour-market disciplines. Others, such as educational or entrepreneurship grants aim to promote desired social values, support transitions to sustainable livelihoods and build resilience to shock. By replacing direct provision of rations of cereals, pulses and oil with market-accessed food commodities, cash-based programmes aim to revitalise depressed markets, encourage markets to procure locally, and spur local production. For over four decades, the US has sent its grain surpluses to feed South Sudan - a long-running and controversial policy which may have depressed local production and undermined local markets. But Chinese customers now want these grain surpluses, and shifts in the international commodity trade may bring the era of in-kind assistance to a close. Cash-based programmes provide a means to shift the humanitarian system away from in-kind assistance – to a new system structured around local markets and local currency.[8]

In South Sudan, some of these ambitious aims are likely to interact with conflict. And although cash-based programmes are still small-scale, they are already making changes to economic and financial structures in the country. All these changes in a country gripped by economic crises and civil war have led donors and humanitarian agencies to express anxieties about cash-based programmes, including concerns that:

- Cash will race unpredictably through the economic circuits that underpin the war: Throughout South Sudan's history, military leaders have used famine, food and food aid to control populations – feeding allies and starving out enemies.[9] **Cash assistance can be diverted away from life-saving goals into the illegible and predatory war economy, which is constructed around exchange rate arbitrage in the capital and checkpoints in the states**.
- South Sudan's markets cannot cope: Cash-based programmes require a move from rations distributed by non-profit agencies according to entitlement criteria to saleable commodities distributed by market traders according to purchasing power. **South Sudan's weak, poorly-integrated markets and financial services, beset by increasing inflation and currency collapse, are ill-suited to replace in-kind relief deliveries**.[10]
- **Access to cash may put programme beneficiaries at increased risk, and because cash-based programmes often target more women than men, these risks may be gendered**. In 2016, cash transfers were suspended in Juba Protection of Civilians sites, after women leaving the sites to buy food were attacked. Cash-based programmes leave to beneficiaries all decisions about spending the financial resources they transfer. Sometimes, spending decisions made may run counter to the interests of female household members.

This paper addresses some of the concerns about cash-based programmes in South Sudan by looking at how these programmes interact with conflict in three main areas: exchange rates, commodity prices and the macro-economy; financial services, trade and the checkpoint economy; and local systems of production and exchange, which are often structured around kinship. Each of these areas has been distorted by conflict. Along the way, it compares actual and potential conflict impacts of cash-based programmes with those of in-kind relief programmes.

This paper is based on a review of literature on humanitarian assistance and cash-based programmes in South Sudan, and about 65 individual and group interviews conducted with humanitarian organisations, cash-based programme beneficiaries, financial service providers, traders, local officials and others. Interviews were conducted in February and March 2018 in Juba and in Lakes State and Unity State, two locations on the White Nile trade corridor (one of two main trade corridors).

Exchange rates, commodity prices and cash-based programmes

South Sudan has an official exchange rate and a parallel exchange rate (sometimes called the unofficial or black-market exchange rate). **Exchange rate differentials are likely to play a part in the war economy.** Conflict actors in official positions can profit by securing official-rate dollars which humanitarian actors are required to process through government-supervised banks, and then selling them at premium, parallel-rate prices. Cash-based programmes are usually financed in US dollars (USD) or other internationally-traded currencies – but they are paid out to beneficiaries in South Sudanese pounds (SSP). **This means that cash-based programmes are entangled with local exchange rates – and this entanglement may contribute to conflict.**

In 2011, South Sudan's new currency was pegged to the USD – a policy which was intended to protect the new country from exchange rate volatility, and from the risks that its petroleum-backed currency might become over-valued, thereby undermining exports. But in 2012, the currency began to slide. War with Sudan and depressed oil prices created a fiscal deficit and the government printed money to finance that deficit. This policy led to hyperinflation and a devaluation of the SSP on the parallel market. In late 2015, the government abandoned the fixed official exchange rate. Since then, with one brief uptick in 2016, the pound has depreciated steadily, and the gap between official and parallel rates has widened. In February 2018, the official rate was SSP 130 to the dollar, and the parallel rate was SSP 230.

Humanitarian actors and financial service providers say that they use official rates, or something near official rates. One of the aims of cash programmes is to relocate spending in-country, and **it seems likely that an expansion of cash transfers will mean that a higher proportion of humanitarian aid will be spent in South Sudan, and exchanged at or near official rates**. Agencies delivering in-kind humanitarian programmes also use official exchange rates for some of their transactions. But cash-based programmes explicitly aim to use local markets and local currency. Representatives of one financial service provider delivering cash around the country for humanitarian agencies said that they transfer much higher values of cash for cash-based programmes than they do for salaries (most of which are paid through bank accounts in Juba or East Africa). This suggests that cash-based programmes may bring new opportunities for those positioned to take advantage of official/parallel exchange rate differentials.

South Sudan's exchange rate problems originated, in part, because of the extremely narrow nature of South Sudan's economy. Oil is its major export, and all of its oil is exported. The collapse of oil exports caused a collapse of the currency. Cash-based programmes can work around very high inflation, because humanitarian agencies occupy a commanding position in the dollar economy and they can exchange US dollars into South Sudanese pounds around the time when cash transfers are made.[11] When humanitarian agencies use exchange rates that fail to keep pace with food price inflation, cash-based programmes are unpopular. However, the widespread use of cash in South Sudan is relatively recent. In 2014, for example, WFP distributed USD 1.3 million in cash and vouchers for general food assistance, about 5 percent of its 2017 distribution.[12] This was a period of declining international grain prices, which enabled beneficiaries to access grain at predictable and favourable prices. If prices had increased instead, it would likely have pushed the risk and the burden to beneficiaries.

Paying attention to international grain prices was one of the lessons of the response to the 2011 famine in Somalia – a country which is also highly exposed to international grain markets. One of the reason for the famine was a rise in global food prices, and one of the reasons that cash transfers worked in Somalia is that international grain prices began to decline after the first rains of 2011.[13] Cash-based programmes in South Sudan might tie the economy, and the currency, more deeply into volatile global prices for imports as well as exports, which might intensify crises in the future if it increases dependency on grains bought on the international market.

Financial services and trade: Cash-based programmes and the checkpoint economy

South Sudan's checkpoint economy is a major component of the war economy, and it depends on extracting goods and cash from surface transport systems. All across the country, armed actors tax or expropriate goods and cash travelling on the country's roads and rivers. Many checkpoints are operated by the national army and its allied militias, but others are freelance affairs. The checkpoint economy predates the current crisis – until 2012, checkpoints were central to the exercise of economic authority for local governments.[14] But today, checkpoints have become part of a war economy fought across many different fronts by many different actors. **Checkpoints have made surface transport networks into the main arena for interaction between the humanitarian system and conflict.**

Humanitarian agencies outsource this risky conflict interaction to transport companies. For example, more than half of WFP's trucking needs are contracted out to private sector operators, who bear disproportionately large risks and who deal with the checkpoint economy as they see fit (WFP's logistics system serves most NGOs and UN agencies in South Sudan). In 2016, transporters charged WFP 350 USD per metric tonne for the 1,000 km truck journey from Juba to Bentiu, one of the costliest such journeys in Africa.[15]

On the face of things, the checkpoint economy is much more closely linked to the delivery of bulky, in-kind humanitarian assistance than it is to the delivery of cash across the country. But **this study reveals that cash transfers are also implicated in the checkpoint economy, because of the way that emerging financial services systems work.** When South Sudan's civil war began in 2013, bricks-and-mortar bank branches began to disappear from South Sudan's provincial towns. They were replaced by financial service providers who were able to get cash moving across the country. This study found two models for transferring cash:

Financial service provider A transports money out of Juba in charter planes or on WFP flights under contract to NGOs. In government areas, they hire a few National Security personnel as guards, paying them each SSP 1500 a day as a consideration (in some peaceable IO areas, they hire no security at all). The service provider pays out cash directly to intended beneficiaries and staff.

Financial service provider B supplies a network of shops around the country, selling mostly imported goods which need to be bought in USD. Financial service provider B hires truck companies to deliver the goods to supply these shops which sell goods in South Sudanese pounds, leaving shop-owners holding huge stocks of South Sudanese pounds in otherwise depressed markets. **Cash transfers** offer a great way out – the financial service providers **take cash in USD from humanitarian agencies at the official rate in Juba, and transfer them in SSP to intended beneficiaries from shops around the country**. That saves them the cost of moving depreciating South Sudanese pounds to Juba, and the trouble of finding someone to sell them US dollars.

Financial service provider B transfers risk to transport providers, the actor in this system who has to deal with the checkpoint economy. The goods moved by the transport providers allow traders to make profits which they can pay out in cash transfers. This system predates the current crisis but it is clearly expanding in scope. Because humanitarian agencies use official or near-official rates, this business is lucrative. One financial service provider interviewed said that it charges no commission on transfers from USD to SSP, about 4 percent on the value of USD to USD transfers, and 10 percent on SSP to SSP transfers. Both financial service providers A and B say that their work on cash-based programmes is expanding, and that the government regulates their activities with a much lighter touch than it does humanitarian activities, and this in turn suggests that the government welcomes the inflow of cash. The interviewee commented that they never had difficulties in getting official permission to move money, although other informants note that delays and bureaucratic impediments are a common experience in moving funds from Juba to locations across South Sudan.

<u>Reported official procedures required to transfer cash outside Juba</u>

Financial Service Provider A	**Financial Service Provider B**
National Security Financial Department	National Security
Central Bank	Central Bank
Relief and Rehabilitation Commission	
National Security (again)	
CID	

Financial service providers have developed a new infrastructure that brings together the interests of humanitarian agencies, traders and checkpoint personnel. As long as sufficient US dollars can circulate in this infrastructure, there is incentive to ensure financial service providers can work around insecurity. But the transaction costs of working through this infrastructure may well increase proportionally faster than any increase in cash volume, if the checkpoint actors become more aware of their power, or if they multiply, or if supply lines become hungrier or longer. Likewise, if cash-based programmes expand geographically, checkpoints may expand with them. **The checkpoint economy is deeply linked to the local and national political and conflict dynamics, and this means that the new infrastructure pioneered by financial service providers may not be able to deliver to areas where conflict risks are high** (see below, Cash-based programmes and in-kind programmes: Changing patterns of risk). Programmes would need to be able to adapt quite quickly to such changes with respect to humanitarian needs.

A third option of cash transfers may be on the horizon. In December 2017, South Sudan adopted regulations for mobile money systems, like the M-Pesa system that has transformed financial services in East Africa. These systems require networks of agents – Kenya has 40,000 M-Pesa agents. A significant contribution to successful humanitarian implementation across Somalia is due to efficiency and widespread access to mobile money transfer systems, including Dahabshiil.[16] South Sudan may not be able to make mobile money work – the recent closure of the Vivacell network suggests that the mobile phone sector is under duress. But if South Sudan is to make mobile money work, it will need to set up a large network of agents in a country where banking services do not extend far out of the national capital. In fact, any expansion of financial services in an unbanked country requires these agents as well as a reliable mobile phone network – all the banks and financial service providers interviewed for this study indicated that they are planning to expand their networks of agents.

Financial services are built around trade networks, which have attained enormous economic importance over the past two or three decades. This period has marked the shift from the time when South Sudan produced all its own food to the chaotic, post-subsistence economy of today, when nearly all food is bought.

South Sudan's dependence on external food sources can be estimated from grain imports and relief distributions. Steamer records from the 1950s suggest that South Sudan imported about 3,000 tons of grain a year.[17] In 1973, South Sudan's Relief and Reconstruction Commission and the UN distributed about 22,000 metric tonnes of grain and other foods to refugees returning at the end of South Sudan's first civil war.[18]

South Sudan is markedly more dependent on relief food today – the grain imports of the 1950s are about as much as the average weekly WFP distribution in 2017, and the total relief distribution in 1973 is a little more than the average monthly WFP distribution that year. But **market dependence is the real story**. Although South Sudan is markedly more dependent on relief food than it was forty years ago, it is even more dependent on food commodities sold in markets. Relief food today only accounts for about a tenth of total grain consumed. Since they began in the early twenty-first century, household staple food supply data suggest that the average South Sudanese family depends on market purchase for about half the grain they consume, and own production for about a quarter. See Annex 1 for charts that show this, as well as the significant regional and seasonal variations.[19]

Although the average family is highly dependent on markets, few of them have access to cash. A 2017 WFP study found that South Sudan was the most expensive place in the world to buy a basic meal, relative to income. They estimated that an average South Sudanese needs to spend 155 percent of their daily income in order to buy a plate of beans.[20] This household cash shortage predates the conflict: the 2009 household survey found that half of the population had not used cash in the past seven days.[21] This contradiction lies at the heart of South Sudan's social crisis, and also at the heart of the expansion of trade and markets, which appears to have continued despite the current conflict.

South Sudan has always had a hunger gap – a lean period before harvest. In the past, people would manage the hunger gap through systems of livestock/grain exchange – moving grain from areas of surplus to areas of deficit. These exchange systems often operated outside markets and money, and were often structured around the reciprocal relationships of kinship. Intermarriage allowed these relationships to develop between different communities. This study focuses on trade in the White Nile corridor, where some Nuer groups in southern Unity State and Ayod in Jonglei have marriage links and exchange relationships with Dinka people in eastern Lakes State and Duk in Jonglei.

But the 1983-2005 war displaced people to camps and towns, deeply undermined local agricultural production, and deeply distorted the livestock economy. Instead of using traditional systems of exchange to manage the hunger gap, people had to finance the hunger gap – they had to find money to cover their needs. This is an enormous shift from an economy based on reciprocity to one based on money, almost incomprehensible to people born and raised in a money economy.

This shift took place over the twentieth century, but it accelerated rapidly during the war which lasted from 1983 to 2005. In 1997, markets began to grow along the White Nile trade corridor after the Khartoum Peace Agreement, which reopened the river to barge traffic and goods from Khartoum. These markets expanded further after 2005, as the government put an estimated 400,000 people on its payroll – about 5 percent of the population. This payroll policy expanded the use of cash and helped to develop markets across the country. Supply lines shifted away from Khartoum towards Juba and Uganda.

The civil war that began in December 2013 cut off supplies from Juba to opposition-controlled areas. Some of these areas reopened supply lines that had their origins in the old livestock/grain exchanges structured around kinship. Along the White Nile corridor, people in predominantly Nuer opposition areas began trading with predominantly Dinka areas of Duk in Jonglei, or Amongpiny in Eastern Lakes – areas where they had histories of intermarriage. Competition over trade emerged, with traders from predominantly Dinka areas such as Bor in Jonglei or Shambe in eastern Lakes, and a number of traders were killed before a localized trade agreement was reached in 2015. In spite of the political and ethnically linked violence in Juba since December 2013, the ARCISS peace agreement reached in 2016 has allowed traders from opposition areas to be able to travel to Juba in person to source supplies.

Trade lies at the heart of the financial networks and supply systems that are needed for cash-based programmes to work. But as this brief history of trade along the White Nile corridor shows, trade systems are deeply influenced by political developments, such as peace deals, and also by kin and ethnic relations. The following example shows some of the political and ethnic calculations of a Nuer trader who brought a cargo from Juba to a small market in Unity state in December 2017.

A trader's trip from Juba to Unity State in December 2017

Item	Item cost at purchase in Juba, SSP	Number purchased	Total cost of items at purchase in Juba, SSP	Transport and checkpoint fees, SSP	Taxes paid to SPLM-IO authorities, SSP
Sugar, 50kg sack	6500	20	130000	20000	1200
Rice, 25kg sack	3000	30	90000	15000	900
Salt sachets		240	1200	450	12
Oil, 20l jerrycan	4000	35	140000	15750	240

Traders who travel with new stock on a boat from Juba face four SPLA checkpoints, and for an 800,000 SSP load, they expect to pay a total of about 200,000 SSP in fees. In addition, stock gets confiscated, and several traders said that soldiers plant bullets in the boat in order to extort bribes. The system is ethnicised: boat providers come from the Dinka community and Nuer traders say that they have to pay more than their competing Dinka traders. Sometimes, Nuer traders say, the SPLA count the six scars on their foreheads with their fingers and charge them 60,000 SSP. The trader who made this trip in December 2017 decided to outsource all these costs and risks to a boat provider, and took a charter flight home.

This trader is a former beneficiary of a DFID-funded cash transfer programme which sought to revitalize markets in Unity state, an area where famine was declared in 2016. In 2015, he was one of thirty traders in his area who received a cash transfer worth 1,120 USD (40,000 SSP) to help him restock. The transfers were worth almost as much as his

2014 revenue for 2014 of 50,000 SSP. The programme also provides USD 64 per year, paid out in SSP at official exchange rates, in four hungry-season tranches, to about 3000 poor households. The programme aimed to increase demand and supply simultaneously, and according to several interviewees, led to significant market growth.

These positive outcomes are nonetheless tied up with the conflict. Trade finances checkpoints and risk gets shifted to transport providers who may use their ethnic affiliations to better negotiate their way through checkpoints. **This ethnicised trade system may even create incentives for alliances between transport providers and checkpoint organisers**. Nuer traders supplying opposition areas along the White Nile corridor report that they rely on Dinka traders to transport food along the corridor, and Dinka traders compete, sometimes violently, for control of the trade. A representative of the local authority in one opposition area in southern Unity appeared aware of some of the risks of the current trade system. He said that he wanted airdrops to continue, probably because deeper dependence on the White Nile trade corridor might put his area at risk of siege, or allow for the emergence of new or strengthening of existing alliances between transporters and checkpoints.

Cash-based programmes and in-kind programmes: Changing patterns of risk

Are cash-based programmes more likely than other forms of assistance to support South Sudan's war economy, which is configured around its exchange rate policies and its checkpoints? In-kind assistance probably amounts to at least ten times the value of cash-based programmes in South Sudan. Most of the funds supporting the delivery of in-kind assistance are spent outside South Sudan – on air operations, grain supplies, or on international salaries and services. That means that most of the funds are not converted into local currency, and powerful arbitrageurs are not able to use them to make profits from exchange-rate differentials.

GDP and international assistance in South Sudan in 2017	
GDP (2017)	2,915 million USD
Humanitarian funds (2017)	1,511 million USD
Peacekeeping (Jul 2017-Jun 2018)	1,071 million USD

In contrast, **cash-based programmes transfer significant amounts into local currency**. For example, DFID's Girls Education South Sudan (GESS) project delivers about 4 million GBP in cash per year, exchanged at or near official rates. The EU's IMPACT teacher salary programme delivers about 13 million euro a year, also exchanged at or near official rates. WFP delivered cash and vouchers valued at 24 million USD a year in 2017. **These sums in aggregate make up 1.5 percent of GDP (using the IMF's conservative GDP estimates)**[1] **and perhaps 5-10 percent of government expenditure**.[22] If they increase significantly, they may begin to have a macro-economic impact.

In-kind humanitarian supplies delivered by surface transport also benefit the checkpoint economy. WFP handles logistics and transportation for most humanitarian agencies, and those costs make up over half of WFP's operational budget[23] In 2016 WFP transported almost three-quarters of food assistance by surface transport – about 200,000 metric tonnes of food (another 63,000 metric tonnes by air).[24] Food transportation was mostly outsourced to private transport contractors, who moved food in 40-tonne lorries, charging an estimated 12-14 USD a kilometre, a premium rate.

Switching from in-kind food assistance to cash transfers will have many implications for South Sudan's surface transport network and the financial services and checkpoint economies that are structured around it. It is not easy to compare risks of potential future systems with the risks of the current system, especially as not enough is known about the current system.

[1] GDP figures from IMF data available at http://www.imf.org/external/pubs/ft/weo/2017/02/weodata/weoselser.aspx?c=733&t=1, accessed on 12 Mar 2018; humanitarian funding figures from OCHA data available at https://fts.unocha.org/appeals/538/summary, accessed on 13 Mar 2018; peacekeeping figures from UNMISS data available at https://peacekeeping.un.org/en/mission/unmiss, accessed on 13 Mar 2018.

However, some risks can be approximately quantified. Total cereal consumption in South Sudan in 2016 is roughly estimated at about 1.3 million metric tonnes.[25] About half of this food was purchased from markets, and about 22 percent was provided by WFP (265,000 metric tonnes, some of which no doubt also went into and out of the markets). If WFP replaced all in-kind relief with cash-based programmes, traders would have to finance and organise the delivery of about one quarter of South Sudan's cereal needs, which is currently financed and organised by WFP. Traders would use existing systems, but those systems would change and would probably expand. Some changes may be for the better: the WFP pays premium prices for surface transport, and local traders might be able to navigate the checkpoint economy more cheaply and skilfully than a massive UN logistics operation, and thereby reduce the gains to checkpoint organizers. But some might be for the worse. **Traders desert some markets, such as Pibor, in the rainy season, and without relief distributions, and it would be hard to keep such areas supplied with food.** Financial services might be structured even more closely around the surface transport system and the checkpoint economy, as traders would have to come up with innovative methods to finance food distribution in a country where market functioning is in question.

'**Market functioning'** is an elusive term from cash literature. **The term appears to mean a market where traders have connections to other markets which are wide and deep enough to manage shifts in supply and demand without significantly inflating food prices and without creating artificial scarcity through hoarding.** These markets also have to deal with seasonality, which affects local production and supplies from outside. In some depressed markets, like Akobo on the Ethiopian border, humanitarian workers report that local community representatives rejected cash-based programmes, because of costs and volatility of supply. A switch to cash-based programmes in such areas might risk local food security.

Cash-based programmes and local systems of production and exchange

Most cash-based programmes in South Sudan support food security and livelihoods, although there are fairly significant cash-based programmes supporting basic services, shelter and social protection. The preceding sections of this paper looked at how these cash-based programmes interact with two main components of the war economy – exchange rate arbitrage in the capital and checkpoints in the states. All cash-based programmes interact with these components of the war economy. But the final section of this report looks at the way that cash-based programmes can interact with conflict at a local level, through market impacts, kinship networks and gender. It is focused primarily on cash-based programmes supporting food security and livelihoods and is based on research visits to two locations on the White Nile trade corridor, one of them under opposition control and the other under government control.

Local Market Impacts

Markets cluster around displaced people: Local systems of production and exchange have been transformed by the past three decades of conflict. It was noted above that this transformation has made people much more dependent on markets for food – although most people directly affected by conflict seldom have money to spend. This contradiction lies at the heart of social change in South Sudan, and it is played out in local systems of production and exchange. Production, markets and displacement all interact with each other. Displaced people are more market-dependent because they have lost access to land and other productive assets. Some of the biggest cash-based programmes in the food security and livelihoods sector operate in displaced communities such as the UN's Protection of Civilian (POC) sites or the Minkaman settlement in Eastern Lakes, home to tens of thousands of people displaced from Jonglei. Displacement plays an important role in shifting people towards dependence on markets, and as markets cluster around displaced people, there is a risk that cash-based programmes will also cluster around them.

Markets are beginning to penetrate the livestock economy: South Sudan's livestock help to insure pastoralists against conflict, climate variation and financial crises. In many parts of South Sudan, a lack of livestock is an indicator of vulnerability, and ownership of livestock disqualifies households from programmes conditioned on vulnerability: If you have cows, you're less likely to watch your children go hungry.[26] Livestock-keeping is economically rational. In many parts of South Sudan, the livestock economy is structured around kinship system. Complex systems of cattle ownership, which give many different people rights in particular cows, are one way of keeping cattle within the kinship economy, and insulating the cattle economy from markets. Much of the livestock holdings in the pastoralist economy are social capital and not usually available to be monetised, unless under extreme economic stress. But under South Sudan's emerging market system, people need to finance the hunger gap, and some people are selling cattle in order to do this. Particularly during the hunger gap the terms of trade for livestock are unfavourable. Cattle sales are likely to affect poor households disproportionately, but they are part of the shift towards the market. This shift is happening independently of cash-based programmes – but those programmes are likely to intensify it.

Markets, Production and Seasonality*:* Across most of South Sudan, there are two essential cycles which can influence viability of cash transfers and the impact on food production and markets. The first is the harvest cycle. Households are likely to be most food-secure in the period from September to December (depending on location, as this is later further north in South Sudan) after they have harvested. They are at this point least likely to need either cash or external food support. This is the period when most food rations from humanitarian general food distributions turn up in local markets as families have enough from their own resources. This is also not the season to implement food for assets or cash for assets projects as households are actively engaged in harvesting and cutting grass and poles in the forest. The hungry period, when the harvest has run out, usually starting in January and continuing until at least August. This is when households need either food assistance or cash to buy food.

The other relevant cycle is the rains and the supply lines for local markets. For most of South Sudan, the period from June until about January is problematic or impossible for overland access and supply chains. There is little or no food for sale in local markets. Many markets in rural areas, such as those in Pibor, simply close and the traders depart until the next dry season. Programmes that are structured towards putting additional cash into the local economy should time this for periods when markets are likely to have a sufficient supply of food to sell. Putting more cash into a market where there is an inadequate supply may increase prices and contribute to hoarding and conflict. This was the reason that some humanitarian agencies abandoned the idea of using cash or vouchers in Akobo. The community and the local leaders rejected the idea as they said there was no local food in the market to buy and the supply from Gambella was insufficient and over-priced because of the problems and costs of delivery through Ethiopia.

Cash and Kinship

Markets are changing kinship: Production and exchange were traditionally organised around kinship in many South Sudanese societies. But the logic of markets is to erode and distort kinship loyalties – even to see kinship loyalty as a kind of 'corruption' that needs to be rooted out. For many South Sudanese, however, kinship is a framework for social protection. One interviewee gave the following account of his escape from violence in Unity state at the outset of the civil war:

> *"In January 2014, the conflict reached Leer and I went south to the deepest villages. It was hard for an urban person. But the family in the villages fed me, even though I had no cattle or grain. About five or six families moved to the village with me, a huge burden which they accepted graciously. Those who went to the villages were people with social relations. Those who went to the POCs had lost social networks. They probably lost them before the crisis – by not contributing to bride wealth or homicide compensation. They lost their ties because of urbanisation. Business is another thing. You don't want to give out things anyhow, because you lose your business."*

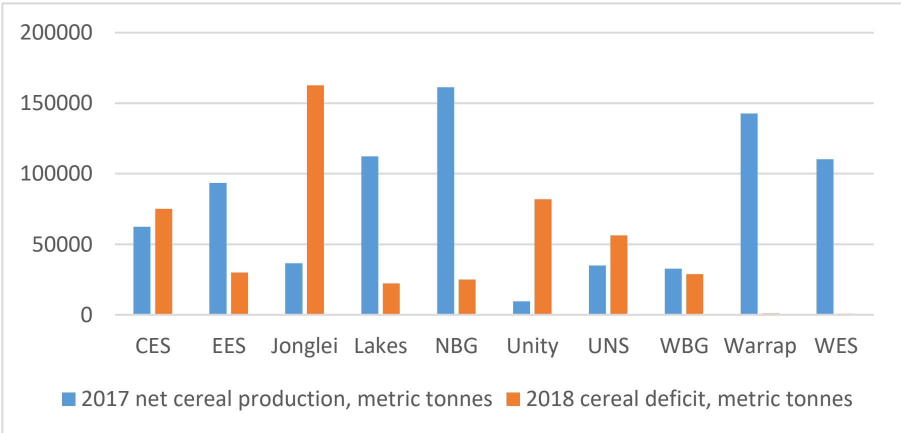
Undermining kinship relations may have pushed people towards the POC sites, or proto-cities. Cash is very important in these sites – the same interviewee said that he thought that people were getting married with cash bride wealth in the POC sites, although they all deny it. The shift away from kinship appears to have been a costly one. But what replaces a kinship economy? How do people chart a course towards a new, generally hungrier system, structured around a market? Evidence from other African societies suggests that this shift requires improvisations.

First, the shift from the self-reliance of a kinship-based subsistence economy to market dependence is often a traumatic one – people lose access to land and natural resources and are pulled towards markets. Initially, the shift away from self-reliance may make people less productive and hungrier. They have to find ways to survive and succeed in the market economy. Their social networks are likely to be damaged during the shift away from traditional systems. They cannot, however, abandon social networks, which are key to long term survival, and so they need to refashion them. Instead of using the kinship system to organise production, they have to use it to persuade their kin to provide for them – like the junior relatives who crowded the homes of wage-earning bureaucrats in South Sudan's provincial towns during their brief moment of prosperity.[27] They need to develop survival livelihoods which may be ecologically damaging – like certain kinds of firewood collection and charcoal production, as a prominent example – or may be violent – like the looters in rural areas and the gangs in POC sites and towns. These social changes are not caused by cash-based programmes. But cash-based programmes are intended to intensify dependence on markets and programme designs should take into account how this dependence is linked to negative livelihoods strategies.

Markets are penetrating society: One way in which people orchestrate survival is to use innovative forms of finance that are structured around kinship relations and social values of honour and shame. Customers in some rural markets do not have money to buy food, and sometimes they agree a futures contract with traders in order to procure it. Traders sell half a litre of oil for 200 SSP against a future payment of sorghum at harvest. Traders collect the sorghum at the harvest-time oil: sorghum price ratio – which means borrowers have to produce more sorghum than they would have needed to obtain oil in the dry season. Traders profit again when they sell the sorghum in the lean period, as the grain prices increase. Borrowers prefer this system to selling a cow to finance the hunger gap. Many of the traders in this market are not literate, but they are able to manage these contracts through personal relationships rather than written records. Chiefs holding court near the market reported that they deal with some defaulters – but defaults are relatively rare. Systems of honour and shame guarantee payments. These contracts show the relevance of kinship and social values in making markets work. They also show how markets may stimulate commercial agricultural production. Even though the quantity produced in this example is negligible, it marks an important shift away from traditional farming. These innovations may be socially beneficial, but they demonstrate the interplay between market penetration and kinship, which are also relevant to any interventions aimed at promoting the use of cash and markets to manage food security.

Markets, kinship and production: South Sudan no longer produces enough food to feed itself, and the war-produced market system has made people hungrier than they were when the subsistence economy was largely intact. FAO data on cereal production suggests that production increased significantly after 2005, when the conflict with the Khartoum government ended and more land was brought into cultivation.[28] Good rains allowed production gains to be maintained after the civil war began in 2013. But when the civil war spread to the Equatorias in 2016, production dropped sharply and cereal deficits grew.[29] But there are huge regional variations in production and in deficits.

One of the premises of cash-based programmes is that they are expected to stimulate local production, allowing local markets to organize a new form of food security that would replace the food security of South Sudan's old, and often affluent, subsistence system. If commercial grain farming becomes more widely established and viable, the local markets will also have to compete with export schemes in order to obtain grain to sell, which would increase prices at the local level.



Cereal production and cereal deficits by state in 2017-18

But much of the traditional agriculture production still relies on kinship and social networks. Farmers in southern Unity state said that they had to maintain stocks of food for the planting season. One farmer in his fifties, whose production has been undermined by flooding, said 'When you have less harvest, you get weaker and you can't cultivate by yourself. When you have more sorghum, you can get people to help you.' He was referring to the work-party system, whereby most farmers mobilise neighbours and relatives at peak seasons, in return for food or sorghum beer. The challenges of age stressed farmers are relevant to cash-based programmes because they, like everyone else, are likely to be more reliant on cash as they get older. They need to rework social networks and possibly find new or different sources of finance in order to maintain or increase production. Understanding this transition could help cash-based programmes be more relevant and supportive for local communities.

Production, Exchange, Markets and Gender

Production and gender: Evaluations of cash transfer programmes often investigate the possibility that women might face violence because they benefit from cash transfers, or from poverty because they don't. The relatively few published evaluations in South Sudan showed little evidence that this happens, echoing findings from other countries. Correlations between women's access to waged income and violence against women was identified in contexts distant from South Sudan.[30] Nonetheless, the question of economically motivated domestic violence has become the default 'gender question' for cash-based programmes. This may obscure equally relevant questions about gender, production and markets. Labour for cultivation is gendered. One woman interviewed for this study is in her forties or fifties. She has six children aged nine to 27 and looks after four more, aged six to 20. She is the only person cultivating in her household. The traditional economy in her area had a gendered system of production which gave older people and women a major role in cultivation, and younger people and males a major role in the livestock economy. But education is pulling young people and women away from cultivation, and leaving more work to women in their middle years. Rather than looking exclusively at the potential for these programmes to intensify domestic violence, cash-based programmes should also look at a society where gender and generational differences are changing rapidly. Younger people may be more cash-dependent than older ones. Older women may have a bigger labour burden – but may be less cash-dependent.

Gender and hunger: Another gendered change is suggested by an increase in adultery cases being reported from chiefs' courts in southern Unity state. Chiefs linked the increase to poverty: married women start relations with other men who can better provide for them. In one part of Jonglei, a humanitarian worker reported that the customary compensation for adultery is becoming a means for mobilising cash in economies where most financial resources circulate from and around the humanitarian system. This is an example of the negative strategies that are being adopted in order to navigate the transition from production systems based on kinship and subsistence to production systems based on cash and markets. Looting and selling cattle is another negative strategy. These negative strategies have the potential to damage kinship, kinship-based production, and market systems.

Ethnicity and Markets

Traders and ethnicity: In international literature on cash transfers, the household is routinely presented as a site of conflict – gender rather than generational. Markets, in contrast are presented neutrally, as 'functioning' or 'failing' – a functioning market is one which is able to respond to modest increases in demand in a non-inflationary way. Twenty years ago, markets were depicted differently. In David Keen's book on the famine of the 1980s, traders (often given ethnic markers such as 'Arab,' 'northern' or *jellaba*) were routinely depicted as the villains, or beneficiaries, of the famine: hoarders, spies, profiteers.[31] In many cases these merchants were dealing with many of the problems of today – long insecure supply lines, volatile currencies, high seasonality, low liquidity. In the course of this study, no interviewee presented traders as villains. But in South Sudan, ethnicity gets drawn into many aspects of economic life. In eastern Lakes, many of the traders at one major market (Minkaman) come from Darfur, and this can create conflict with local traders seeking contracts for food vouchers or market share. The Chair of the Traders Union had a significant influence on the selection of trader-beneficiaries, but he was also an employee of the financial services agency and was accused of bias in the selection of Darfuri traders who participated in the voucher system, including from WFP. Local traders felt his legitimacy had been lost but as a 'gatekeeper', he continued to be the focal point for engagement of traders by WFP and ACTED. On the White Nile trade corridor, most transporters are from Dinka ethnic communities. Using people from one ethnic community to navigate the checkpoint economy may create incentives for collusion between checkpoint personnel and transporters.

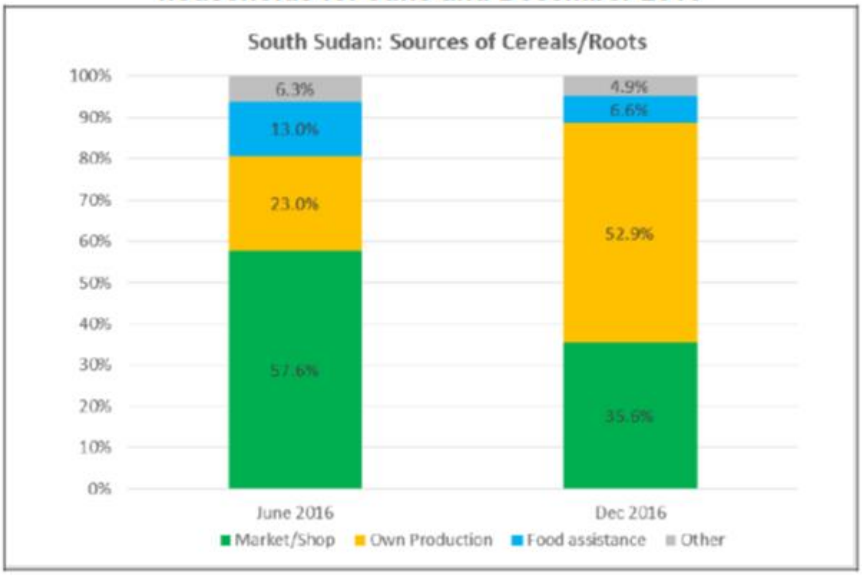
Selecting traders for participation in cash-based programmes and market intervention
Cash-based programmes transfer cash and other benefits directly to traders. This is a form of intervention in markets, and it raises some dilemmas which cannot be resolved straightforwardly. Interviewees in one location in Lakes State said that the chairperson of the Traders Union there was very powerful – he doubles as a staff member for a prominent money transfer agency used by WFP for it cash transfer programme. Some interviewees indicated that he favoured traders on the basis of ethnicity. The cash-based programmes in this area are based around vouchers, and because vouchers there are only handled by selected traders, the programme pushes customer-beneficiaries towards pre-selected shops. Profits in those pre-selected shops are likely to be higher than those in shops which do not handle vouchers. There are two lessons to be drawn from this programming approach.

- First, a voucher-based programme implemented through pre-selected shops is thus more 'interventionist' than a programme based on cash transfers, which could be spent anywhere.
- Second, 'functioning' markets can replicate and aggravate social divisions.

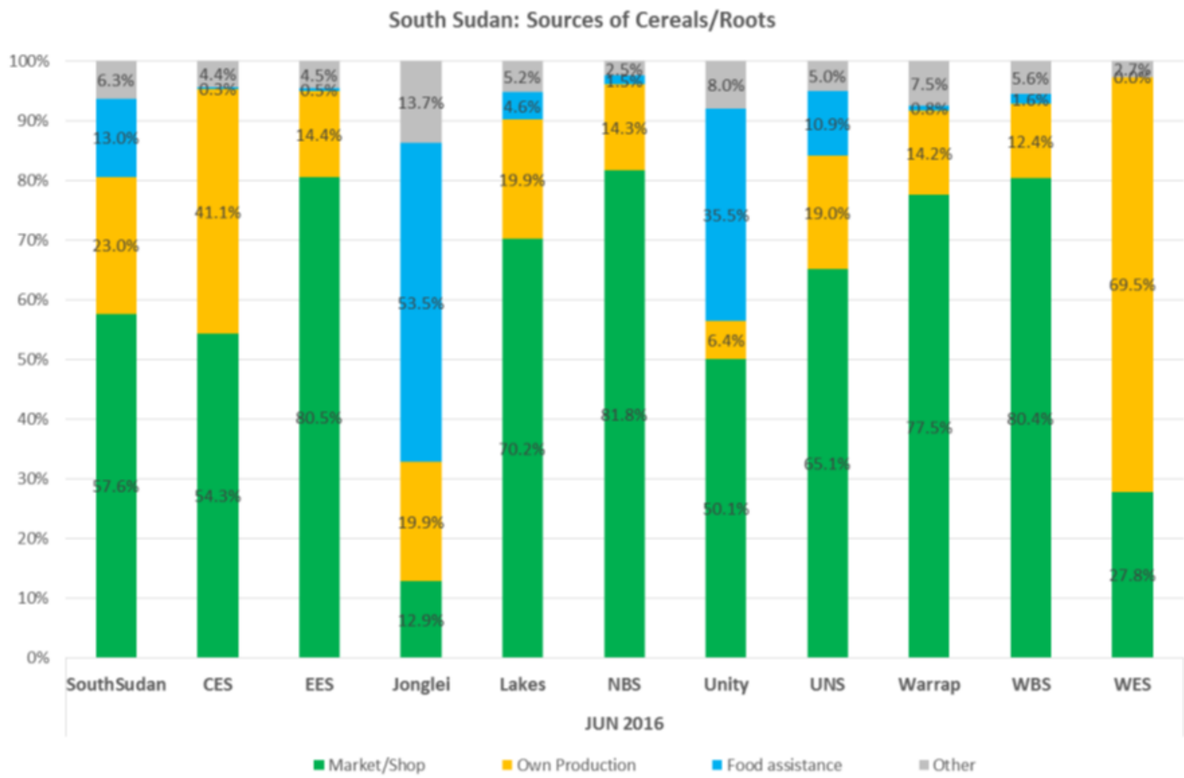
Markets invite complex questions – such as the scope of external intervention in markets, or the way in which market participants can themselves intervene in markets in a way that favours them or their constituency. Cash-based programmes generally improvise responses to such complex questions – questions which are beyond the scope of this paper. Cash programming offers many advantages over provision of in-kind assistance, however critical evaluation of assumptions and analysis is needed in order better understand the longer term implications of how cash-based programming is interacting with South Sudan's social, economic, political and conflict environments.

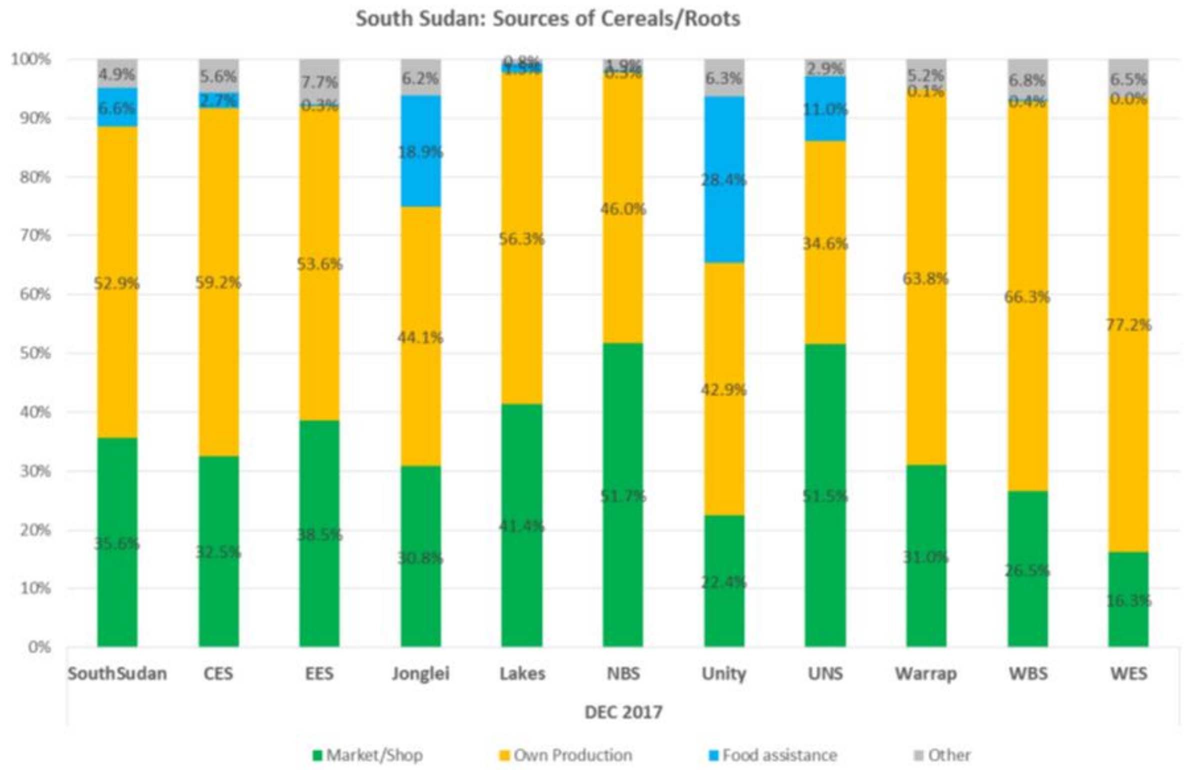
Annex 1: Household food sources: Relative importance, seasonality and regionally

South Sudan - Relative importance of different sources of cereals and roots consumed by households for June and December 2016



Source: FAO/WFP Crop and Food Security Assessment Mission to South Sudan 26 May 2017, page 39




South Sudan: Sources of Cereals/Roots
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
4.9%
6.6%
52.9%
35.6%
5.6%
2.7%
59.2%
32.5%
7.7%
0.3%
53.6%
38.5%
6.2%
18.9%
44.1%
30.8%
56.3%
41.4%
46.0%
51.7%
6.3%
28.4%
42.9%
22.4%
2.9%
11.0%
34.6%
51.5%
5.2%
0.1%
63.8%
31.0%
6.8%
0.4%
66.3%
26.5%
6.5%
0.0%
77.2%
16.3%
SouthSudan
CES
EES
Jonglei
Lakes
NBS
Unity
UNS
Warrap
WBS
WES
DEC 2017
Market/Shop
Own Production
Food assistance
Other

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