Understanding intra-regional labour migration in the East African Community (EAC)
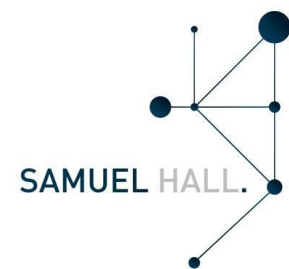
Literature Review

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EARF EAST AFRICA RESEARCH FUND

Department for International Development

Sida

Executive summary

Understanding labour migration in the East African Community

This report investigates intra-labour migration in the East African Community (EAC) through a literature review of existing evidence.[1] The aim of this study, commissioned by DFID and Sida and conducted by Samuel Hall, Maastricht University and the University of Oxford, is to **generate new evidence** to **support government** and **development interventions** aimed at **eliminating poverty** and **reducing vulnerabilities in the EAC** by exploring the potential of labour migration across five countries: **Burundi, Kenya, Rwanda, Tanzania and Uganda**.

This objective will be met by:

1. Strengthening the evidence base on intra-regional labour migration;
2. Understanding opportunities and challenges present for countries of origin and destination; and
3. Enabling decision-makers to maximise the potential of labour migration through the best use of evidence.

Created in 1967, the East African Community initially comprised Kenya, Tanzania and Uganda. Burundi and Rwanda joined the regional organisation in 2007. All five countries signed the **Common Market Protocol** in 2010, which is aimed at framing and regulating labour migration in the EAC. It implements free movement of workers across the EAC countries. In spite of this legal framework that regulates labour migration in the region, policy makers still have a limited understanding of migration flows and dynamics. While the significance of international migration has recently topped the development agenda, the current literature on migration and mobility in the EAC **lacks a specific review of labour** stemming from other forms of migration. Indeed, the Common Market Protocol only applies to the **formal labour market**, which represents less than 20 per cent of employment stocks in the EAC. Migration flows in the EAC are often irregular, and the region is characterised by significant refugee flows. Irregular migrants and refugees are likely to engage in economic activities and to play a role in value chains. This economic participation in the labour market is likely to reshape the functioning of host communities and influence labour market dynamics.

Methodological overview and identification of main knowledge gaps

In the inception phase, the research consortium implemented an assessment of the strength and suitability of existing literature and datasets based on a three-step protocol. By **reviewing, assessing and identifying** insights from each data source, the research team has identified **four main knowledge gaps.**

These four knowledge gaps are the foundation of this research and identify the need for further primary data collection. They are structured around the need to:

1. Map labour migration;
2. Map skill categories and female participation in labour migration trends in the EAC;
3. Map refugees' and irregular migrants' labour and economic contributions; and
4. Map remittances between EAC countries.

Map labour migration → Map skill categories and female participation in labour migration trends in the EAC → Map refugees' and irregular migrants' labour and economic contributions → Map remittances between EAC countries

Understanding intra-regional migration in the EAC

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[1] The list of all acronyms used in this report is available in Annex A.

Main findings of the literature review

Labour force participation is high in the East African Community: more than **64 million people** are engaged in economic activities, representing **70 per cent** of the EAC population. Female workers represent half of the labour force. This significant participation of women in the labour market is specific to the East African context and higher than in other developing countries. One main challenge when analysing labour market participation in East Africa is to decipher the various employment statuses. While the formal sector accounts for less than 20 per cent of total employment, studies highlight the high rates of under-employment in the region (EAC, 2016d). However, the lack of evidence on the profile of workers engaged in the informal sector does not allow for clear estimates of the regional specificities in terms of informal activities.

In this context, documenting labour migration is challenging because of:

1. The heterogeneity of migration drivers and dynamics between each of the EAC countries;
2. The national legal frameworks and work categories within the Common Market Protocol;
3. The lack of data on the labour markets, notably on the role played by female migrants;
4. The share of irregular migrants and refugees that are engaged in economic activities; and
5. The links between labour migration and remittance flows and their impacts on livelihoods.

The EAC is very heterogeneous and each country has specificities in terms of migration flows. While Kenya has the most diverse migrant population, with only 16 per cent of its migrants coming from the EAC, countries such as Burundi and Tanzania host a large share of EAC natives in their immigrant stocks (70 and 59 per cent respectively). The literature has shown that the main push factors of migration in the EAC today are **conflict, unemployment and poverty.** Push and pull factors also vary by location. For example, Kenya attracts migrants due to its strategic location as a regional hub in East Africa. In Rwanda and Burundi, the latest migration trends are more associated with the waves of conflict the two countries faced in the early 1990s and, in the case of Burundi, the recent major refugee movements in 2015.

The Common Market Protocol stipulates that **only qualified East African workers** in specific approved categories may **apply for jobs in any of the EAC member countries**. Each country has its own legal framework defining work categories open to EAC migrants. Kenya and Uganda are the most open in terms of categories and subcategories, while Burundi has the most restrictions. The harmonisation of qualifying occupations is addressed through the enactment **of Mutual Recognition Agreements** (MRAs) relating to regulated professions. **Skills gaps are also important in the EAC**: on average Kenyan workers are more qualified than those from other EAC countries (World Bank Survey of Providers of Professional Services in East Africa, 2009). While migration of qualified workers can have a positive impact on both origin and destination countries through remittances, economic homogenisation between the countries and harmonisation of skills, a large majority of potential employment seekers are being excluded.

Female migrants' economic contribution is not inscribed in a policy framework, and there is a **lack of data on the role played by women in value chains**. Female migrants represent half of overall migration flows, and the migration trends of females closely follow male patterns in each of the EAC countries. However, female migrants face discrimination and appear to be a particularly vulnerable group. Yet, as documented by numerous studies, the inclusion of women in the labour markets has positive impacts on the stabilisation of livelihoods (Collinson et al, 2016). It is crucial to better document the type of economic activities in which female migrants are engaged to implement policies to decrease the discrimination they face.

The current migration situation in the EAC is complex and includes **various forms of migration, such as flows of refugees, internally displaced persons (IDPs), and regular and irregular migrants** (Kanyangoga, 2010; EAC Secretariat, 2011). Due to its nature, irregular migration is inherently difficult to measure, which makes the identification of the characteristics and remittance flows from this form of migration extremely challenging (Koser, 2007). Despite the lack of reliable data, **human trafficking and smuggling** are assumed to constitute a large and increasing part of irregular migration flows in the East African Community (UNODC, 2009).

While irregular migration is very difficult to measure, reliable data on the number of refugees in the EAC is available. According to the UNCHR, **the EAC hosted more than 1.4 million refugees in 2015**, with 270 thousand

originating from another EAC country. Refugee flows account for a large share in recent migration trends: in 2015 the proportion of refugees in the migrant population was above 50 per cent in Kenya and between 25 and 50 per cent in Uganda and Tanzania. Historical trends vary from one country to another, yet it is worth emphasising the large increase experienced by Uganda in its proportion of refugees in the past five years, with refugees constituting 33 per cent of the total number of immigrants in 2016 (UNCHR, 2016).

Uganda is the only country that allows refugees to work in the formal sector (Samuel Hall, ReDSS; 2015b). Other EAC countries deny the right to gainful employment to refugee populations. In spite of this legal restriction, refugees engage in informal economic activities that affect the functioning of the labour markets at a local level (Whitaker, 2002). Refugee flows can be considered as exogenous labour demand shocks on weakly integrated value chains. Therefore, it is very likely that refugee economic participation triggers strong spillover effects on host communities (Stark, 2004) through, for instance, substitution effects with casual local workers (Ruiz and Vargas-Silva, 2016).

The EAC countries have **strong linkages in terms of intra-regional remittance flows**. Burundi and Rwanda receive the largest inflows of remittances in terms of GDP share (more than 2 per cent of GDP), while Tanzania, Uganda and Kenya have a positive balance at the scale of the EAC. Remittance outflows have been relatively stable in recent years despite large variations in migration flows. Moreover, in the EAC, existing data exhibit a positive and stable correlation between the proportion of refugees in the migrant population and remittance outflows. Undoubtedly, remittance flows are not neutral: several studies have shown **significant economic impacts of remittances on both the host and the origin countries**. These flows are likely to play a shock-absorber role (Chami et al. 2009), and the significant flows that circulate in the EAC can play a role in terms of stabilisation of livelihoods and sustained inclusive growth (Taylor, 1999).

Remaining data gaps and implications

While this literature review provides significant **evidence on the intra-regional labour migration** in the EAC, the conceptual framework adopted in this research highlights key **remaining data gaps** that require further research and primary data collection.

More precisely, existing data do not establish a breakdown of migration flows in relation to migrants' demographic and economic characteristics. Little is known on the participation of irregular migrants and refugees in the informal labour markets, which likely affects host communities, local economies and value chains. Remittance flows require documenting, and a particular focus should be placed on the role of women in remittance chains, since they are likely to play a major role in stabilising livelihoods as a shock absorber.

These data gaps hinder the assessment of labour migration implications. It is crucial to fill them in order to generate new evidence that can be used to implement growth-enhancing public policies and better regional labour frameworks.

Further research is needed to develop a **comprehensive mapping of labour migration** and of **economic participation of the different types of migrants.** To that end, the research team developed an ambitious primary data collection framework that will be based on qualitative tools (Focus Group Discussions and Key Informant Interviews), a rapid survey conducted by SMS and a detailed face-to-face survey in selected migration hubs. This research framework builds on the insights presented in this literature review and aims at enabling a combination of primary and secondary data. By cross-referencing the various data sources, the research team will be able to strengthen the analysis and provide recommendations for targeted programmes and policies to address the challenges faced by migrant populations, especially females and under-skilled people.

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GLOSSARY OF KEY TERMS

ASYLUM SEEKERS	"Persons seeking to be admitted into a country as refugees and awaiting decision on their application for refugee status under relevant international and national instruments. In case of a negative decision, they must leave the country and may be expelled, as may any alien in an irregular situation, unless permission to stay is provided on humanitarian or other related grounds" (IOM, 2011).
LABOUR MIGRATION	"Movement of persons from their home State to another State for the purpose of employment. Labour migration is addressed by most States in their migration laws. In addition, some States take an active role in regulating outward labour migration and seeking opportunities for their nationals abroad" (IOM, 2011).
MIXED FLOWS	"Complex population movements including refugees, asylum seekers, economic migrants and other migrants" (IOM, 2011).
REFUGEE	A person who "owing to well-founded fear of persecution for reasons of race, religion, nationality, membership of a particular social group or political opinions, is outside the country of his nationality and is unable or, owing to such fear, is unwilling to avail himself of the protection of that country" (Geneva Convention relating to the Status of Refugees, Art. 1A(2), 1951).

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Introduction

The project

Samuel Hall East Africa (Samuel Hall), Maastricht University and the University of Oxford have been commissioned by the Department of International Development (DFID) and the Swedish International Development Cooperation Agency (SIDA) to undertake a study on intra-regional labour migration in the East African Community, with the aim to generate new evidence to support government and development interventions aimed at eliminating poverty and reducing vulnerabilities by exploring the untapped potential of labour migration across five countries: **Burundi, Kenya, Rwanda, Tanzania and Uganda**.

This research investigates the potential of labour migration to promote inclusive economic growth and poverty reduction. The aim of this project is three-fold:
1. To strengthen the evidence base on intra-regional labour migration;
2. To understand opportunities and challenges present for countries of origin and destination; and
3. To enable decision-makers to maximise the potential of labour migration by facilitating the best use of evidence.

This report presents a detailed literature review and a rigorous analysis of secondary data. Thanks to an assessment of the quality and the suitability of existing evidence on migration and labour markets in the EAC, four main knowledge gaps have been identified.

This work provides key insights on the functioning of labour markets in the EAC and documents in detail the migration trends, remittance flows and labour market outcomes in the EAC. It also identifies room for further research including primary data collection.

Literature Review methodology

This section focuses on the methodology used by the research team to conduct the literature review. It details how the identification and analysis of sources address the research questions. Based on a three-step research framework – "*review, assess, identify*" – this iterative approach allowed the researchers to build and tailor the literature review methodology to the conceptual framework. The key methodological steps are detailed in the following section, while the analytical framework can be found in Annex B.

Review: A total of 87 papers and 36 datasets have been considered as part of the literature and data review on labour migration and remittances across the EAC.

With regards to the dataset analysis, two types of data were studied. First, macro datasets – such as aggregate figures produced by international institutions or national governments – provided aggregated measures for given indicators. For example, macrodata used in the analysis included overall measurements of migrant populations in a given country. These datasets were used to reconcile data from different sources and to highlight comparable data related to particular measurements. The research team constructed its own matrix from these different sources containing all available evidence at an aggregated level. These sources have been used to build descriptive statistics tables. Following this, the research team examined micro-level datasets that contain identified and disaggregated statistical units (e.g., individual, group of individuals, firms, small administrative units). The research team selected a number of surveys conducted in the EAC to use as raw data in order to compute the relevant indicators to address research gaps. The research team used this type of data to produce descriptive statistics and estimations at disaggregated levels and to study possible correlations between relevant variables. While the suitability of microeconomic data to address the research questions was limited, it was relevant to build a statistical framework for further quantitative data collection. Among the selected datasets, national census surveys are valuable because of the statistical significance of the country populations. Census data are reweighted to ensure that subgroups are proportionally represented. These datasets are used as a reference to benchmark, test and analyse specific characteristics of migrants.

With regards to the desk review and paper analysis, the research team began by classifying data sources based on key words. The team built two lists of key words: the first included key concepts related to migration and development studies, with a special emphasis on labour migration's link to development and poverty reduction, and the second focused on the EAC and on the current legal and economic situation in the five countries. In other words, the first list served as a basis to search for all existing studies that related to theoretical knowledge on labour migration worldwide. It used key words such as "labour migration flows", "labour migration stocks", "refugee economies", "irregular migrants", "camps", and "remittances". The second list of search terms focused on a geographic and empirical search across EAC countries. For instance, the second group of papers was identified through key words such as "EAC labour market", "EAC legal framework", "political context", "economic outcomes", "economic contribution", and "poverty levels", with a breakdown by country. To maximise the number of papers, the researchers used techniques such as 'snowballing': i.e., searching the citation lists of selected sources for other references, and 'prioritisation', which uses a hierarchy of the most commonly cited sources in peer reviewed papers to help gather the most reliable information. Papers from both key word lists were included in the analysis and constituted the backbone of the literature review. Additional papers deepened the analysis, broadened the empirical scope and anchored the insights in the overall regional context. A detailed breakdown of data sources is presented in Annex C.

Assess: Having reviewed the existing literature, the research team assessed the relevance of data sources to the study objectives in terms of results, quality and methodology. The quality and suitability of each data source were assessed (DFID criteria) against four research topics: [2]

1. **Labour migration flows.** Does the literature provide a clear understanding of the major intra-regional migration flows in the EAC?
2. **Labour force participation**. Does the literature provide evidence on women's engagement in the labour markets? What is the skill level of migrant workers in the EAC, and how are labour migration flows embedded in regional legal frameworks?
3. **Irregular migration and refugees**. Does the existing literature provide estimates of the number of irregular migrants and refugees in the EAC? Do these migrants engage in economic activities? What are the implications of their participation on livelihood stabilisation?
4. **Remittances**. How are remittance flows measured in the literature? How can remittance impacts be measured in terms of stabilisation of livelihoods?

Annex D presents in detail the key steps of this approach. Annex E presents the list of datasets that have been studied, including dates of data collection, sample size/targets, and/or methodological frameworks. Where appropriate, statistical measurements, such as correlations or cross-tabs, have been produced to compare existing figures. These measures also aggregate or disaggregate data where relevant to ensure that key figures have been comprehensively analysed. A comprehensive list of the research questions is available in Annex F.

Identify: After the researchers reviewed and assessed the literature, research questions were identified to refine the methodology for further data collection, including searching for datasets and conducting analysis and desk reviews. Remaining questions that require further investigation have been clearly formulated.

The assessment framework resulted in the identification of four main knowledge gaps (KG) that can be separately investigated. These gaps have been selected against two criteria: the relevance in terms of labour market mechanisms and the feasibility of addressing them given the state of literature and the primary data collection protocol. The identified knowledge gaps (KG) are:

> **KG1.** The need to map labour migration;
> **KG2.** The need to map skill categories and female participation in labour migration trends in the EAC;
> **KG3**. The need to map refugees' and irregular migrants' labour and economic contributions; and
> **KG4.** The need to map remittances between EAC countries.

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[2] DFID (2014). Assessing the Strength of Evidence. *DFID How-to-Note*.

Conceptual Framework

During all stages of the literature review, the research team's main guideline was to tie the data sources and their insights into the conceptual framework. All materials were considered based on the final objective of the study (outlined in the Theory of Change diagram in Annex G): to understand "*whether there is a clear relationship between labour migration in the EAC and inclusive economic growth and poverty reduction across the five EAC countries*".

This question had been particularly under-studied in the EAC. As shown in the Theory of Change diagram (Annex G), the insufficiency of available data on migration flows and on female labour migration, the lack of understanding of the economic implications of migration patterns, and of policy harmonisation in the EAC are the main challenges faced by researchers and policy-makers.

These challenges make it critical to investigate potential relationships between labour migration and economic outcomes. The labour market is at the core of the creation of value and a necessary component to achieving higher levels of development. Supply and demand characteristics are at the centre of the labour market dynamics and drive many outcomes, including growth path sustainability, the formation of human capital and the stability of institutions. These dimensions directly relate to the inclusiveness of growth and also to poverty reduction.

When considering the supply and demand dynamics for labour in migration-related contexts, the research team found three key variables that determine market equilibrium: **wages**, **remittances**, and **skills and institutional frameworks**. These three determinants of labour market equilibrium are linked to cross-cutting factors, such as migration status or individual characteristics, which further complicate labour market mechanisms.

One key variable in considering migrants' economic contributions is their legality (i.e. regular or irregular migration), and the inclusion of refugees as economic actors. Kenya, Uganda and Tanzania all host significant refugee populations. Overall, the migration context in the EAC is one of mixed migration, including both regular and irregular labour migration.[3] This points to the importance of understanding – and measuring the presence – of "**hard-to-reach**" groups and "hidden populations" to decipher the different economic outcomes for different types of migrants. Last, labour supply is a function of individual characteristics. **Gender, age,** and **skill level** are key variables when studying involvement in the labour market. In particular, female migrants make up half of the global migrant population and are likely to have specific roles in the migration chain (Fleury, 2016).

To address this complex set of interacting variables, each knowledge gap and the underlying research questions should relate to one of the following research outputs:
1. Improve general knowledge on labour migration patterns in the EAC to understand their impact on economic outcomes;
2. Have a comprehensive understanding of migration flows, quantitatively and qualitatively; and
3. Recommend adequate policies targeted at the potential of migration for pro-poor policies flows.

Structure of the report

This report provides key insights and investigates the main research questions associated with each of the KGs, based on a rigorous study of the existing literature and analysis of datasets. It is structured as follows:

Section 2 presents the overall context, providing key figures and insights on the EAC members and on the main trends on the labour markets.

Section 3 presents the main migration trends in the EAC and documents the need for more granularity in the data (KG1).

Section 4 presents national labour frameworks in the EAC countries and sheds light on the need for further data regarding skill levels and females' participation in the labour market (KG2).

Section 5 provides evidence of the large volumes of refugees and irregular migrants in the EAC, and addresses the question that relates to the economic contribution of these "hard-to-reach" populations (KG3).

Section 6 maps remittance flows in the EAC and discusses their implications in terms of inclusive and stable growth path (KG4).

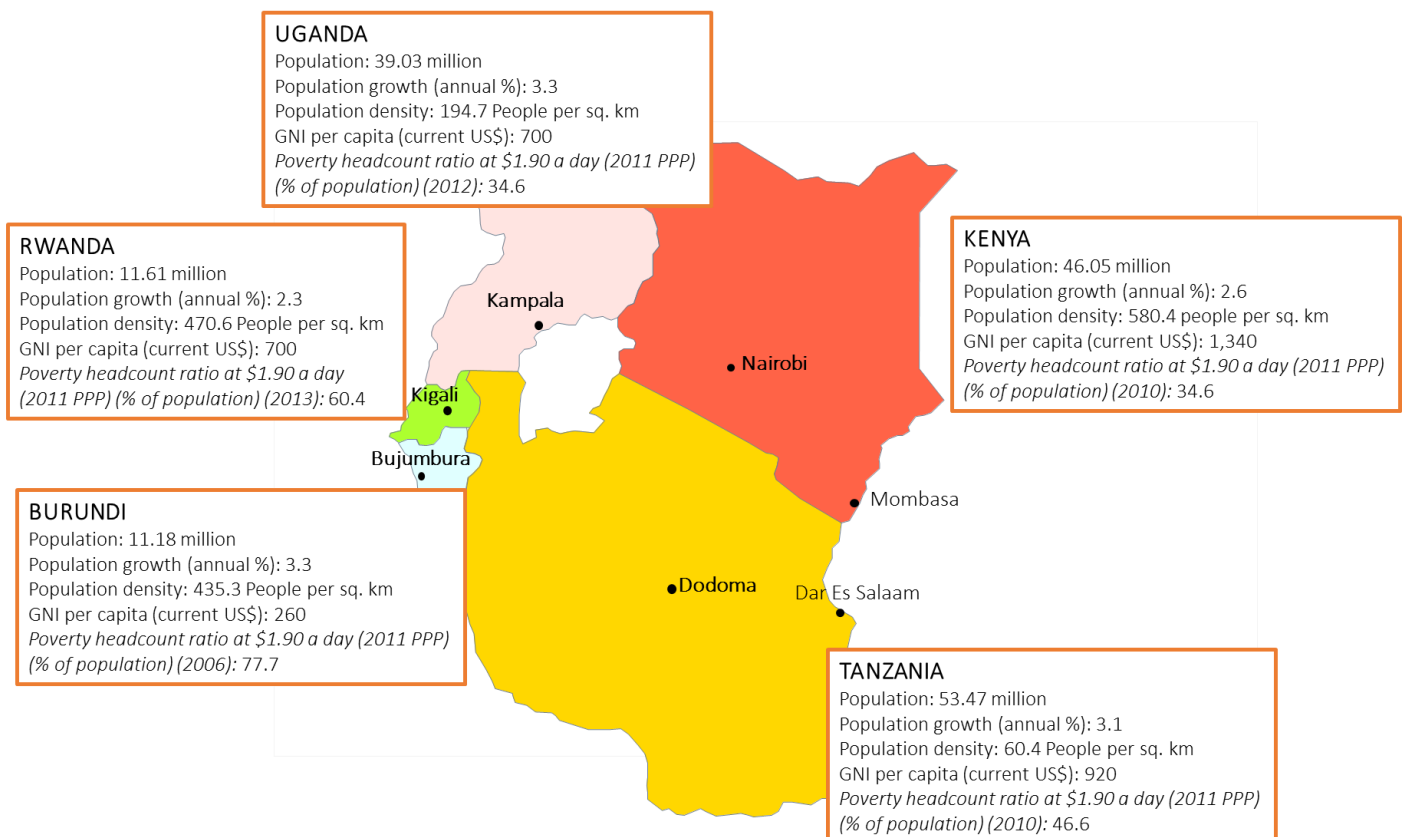**Section 7** concludes on the main findings and discusses the room for further research.

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[3] According to the IOM (2009), mixed migration refers to "complex population movements including refugees, asylum-seekers, economic migrants, victims of trafficking, smuggled migrants, unaccompanied minors and other migrants".

The East African Community and the Common Market Protocol

The East African Community

The **East African Community** is one of the **leading regional economic organisations** in sub-Saharan Africa and comprises the following five countries: **Burundi, Kenya, Rwanda, Uganda and Tanzania**. While sharing common features such as location, high population growth and large levels of poverty, the five countries present diverse profiles in terms of economic organisation growth, political frameworks and territorial organisation (Figure 1). Details on the EAC country profiles are available in Annex H.

Figure 1 - The East African Community: Countries and figures

UGANDA
Population: 39.03 million
Population growth (annual %): 3.3
Population density: 194.7 People per sq. km
GNI per capita (current US$): 700
Poverty headcount ratio at $1.90 a day (2011 PPP) (% of population) (2012): 34.6

KENYA
Population: 46.05 million
Population growth (annual %): 2.6
Population density: 580.4 people per sq. km
GNI per capita (current US$): 1,340
Poverty headcount ratio at $1.90 a day (2011 PPP) (% of population) (2010): 34.6

RWANDA
Population: 11.61 million
Population growth (annual %): 2.3
Population density: 470.6 People per sq. km
GNI per capita (current US$): 700
Poverty headcount ratio at $1.90 a day (2011 PPP) (% of population) (2013): 60.4

BURUNDI
Population: 11.18 million
Population growth (annual %): 3.3
Population density: 435.3 People per sq. km
GNI per capita (current US$): 260
Poverty headcount ratio at $1.90 a day (2011 PPP) (% of population) (2006): 77.7

TANZANIA
Population: 53.47 million
Population growth (annual %): 3.1
Population density: 60.4 People per sq. km
GNI per capita (current US$): 920
Poverty headcount ratio at $1.90 a day (2011 PPP) (% of population) (2010): 46.6

Source: Population, Population growth, Population density, GNI per capita: World Bank – Country Profiles (Accessed February 2017). *Poverty headcount ratio*: PovcalNet Database (Accessed February 2017). Note: Unless otherwise specified, figures are from 2015.

The Common Market Protocol

The first attempt at a formal integration and movement of labour and people within East African countries dates back to the **creation of the East African Community in 1967**. The signing of the Treaty of Cooperation between Tanzania, Kenya and Uganda laid the first formal platform for labour migration in the region. The original EAC disintegrated in 1977 and it was not until 1999 that the Treaty of the East African Community, later extended to include **Burundi and Rwanda in 2007**, attempted to once again formalise labour migration within the region. Current labour migration within the EAC is regulated under the **Common Market Protocol (CMP)** of the East African community. The EAC-CMP came into effect on 1st July 2010 and it provides for, among others, the **free movement of workers across the EAC region**.[4]

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[4] The Protocol defines a worker as "*a person who performs services for and under the direction of another person in return for remuneration.*" The definition of a worker therefore excludes self-employed individuals, who are regulated separately under the "*right of residence/right of*

Note on the EAC and The Republic of South Sudan

South Sudan is the sixth member and last country to join the EAC. Following its independence in 2011, South Sudan had applied to be part of the EAC but the application to the union was controversial given the structural and institutional problems that the country was facing as a new and independent nation. Membership to the union was nonetheless granted with the signing of the Accession Treaty on April of 2016 and official membership was granted on August of 2016.

Although as a new member South Sudan has been given full and equal rights, obligations and privileges, the recent nature of the membership, the differences in accession schedules and the shared history among the other five countries are likely to generate different dynamics of integration. Therefore, this project focuses only on the initial five member countries.

The labour markets in the EAC

There is exceptionally **high labour force participation** in EAC member countries: the labour force participation rate lies between 67 per cent in Kenya and 89 per cent in Tanzania, while the average in Sub-Saharan Africa is around 63 per cent, according to the World Bank data on labour participation (2017). Women's share of the labour force is between 46 and 55 per cent of the total labour force and youth participation in the labour market is one of the highest in the world (Table 1). It is worth noting that these figures encompass both formal and informal employment: the labour force participation is defined as the share of the population who participates in at least one income-generating activity. Hence, it can also consist of self-employment and informal agricultural activities. The World Bank data on labour force participation is mostly derived from national census and surveys. As documented by the African Bank of Development in the specific case of Tanzania, the gaps between male and female labour participation is smaller than the average world gap (African Bank of Development, 2012). Looking at participation rates of people between 20 and 60 years old, the gender gap is less than 5 per cent in Tanzania, while it is close to 15 per cent at the global level.

This high overall labour force participation is often attributed to the fact that EAC countries are **highly agricultural** and have high rates of poverty. Encompassing over a third of economic activity, the agricultural sector is still the largest sector in terms of employment in the East African countries. It is important to note that **employment in the informal sector is particularly high in most countries**, accounting for close to 70 to 80 per cent of employment. The informal economy in the EAC captures a large pool of employment, resulting in many challenges to measure the number of workers, assess the types of activities they are involved in and estimate the size of under-employed and unemployed populations. The mismatch between employment and unemployment rates displayed in Table 1 emphasizes the difficulty of measuring the number of people who are between part-time informal employment and full unemployment.

Although there is not enough macrodata on employment to conduct cross-country comparisons, relatively recent data for Kenya, Rwanda, Tanzania and Uganda **reinforces the importance of the agricultural sector,** with over 70 per cent of average employment as a percentage of total EAC employment (68 per cent for Kenya, 75 per cent for Rwanda, 67 per cent for Tanzania and 70 per cent for Uganda). This is also the sector in which the female participation rate is the highest. Detailed figures on sectors (volume of employments' respective contribution to GDP) are available in Annex I.

The highest rates of unemployment in the region are in Kenya and Uganda. These are, however, two of the largest countries in terms of population. In all countries, except for Rwanda, female unemployment tends to be higher than male unemployment. Most policy reports regarding labour market conditions indicate that youth unemployment remains one of the major issues in the region. Yet, as in all of Africa, the main problem in the region is

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establishment." In addition, the EAC-CMP also clearly outlines the difference with the "*free movement of persons*" by highlighting the provision that free movement of people does not imply the possibility of working elsewhere. Students are covered under the free movement of persons. The EAC-CMP precludes students from the right to work in the host country.

underemployment, or the inability of those who work to earn a decent living. This is especially true in subsistence agriculture and the informal economy, which is mostly dominated by young women and men (ILO, 2009).

Table 1 - Labour force participation and employment in the EAC (2010-2015)

	BURUNDI	KENYA	RWANDA	TANZANIA	UGANDA
Labour force participation					
Labour force, total	4,652,394	16,439,734	5,391,363	23,807,372	14,113,678
LF participation rate	82.5	67.0	86.0	89.2	77.6
LF, female (% of total LF)	51.5	46.5	54.1	50.2	49.3
Employment to population ratio[a]					
Female	76.9	55.44	86.2	84.5	72.22
Male	76.5	66.34	84.72	88.32	76.58
Total	76.72	60.82	85.5	86.38	74.4
Unemployment (% of labour force)					
Unemployment, female	7.52	10.5	0.34	4.2	4.9
Unemployment, male	6.48	8.06	0.8	2.1	3.4
Unemployment, total	7.02	9.2	0.6	3.1	4.1

Notes: [a] Refers to the proportion of a country's population that is employed (aged 15 and older).
Source: EAC and national statistics

As in many other African countries, the **service sector** is one of the **main drivers of growth in the EAC,** especially in the last decade. According to Mibithi and Chekwoti (n.d.), today the sector contributes to more than 50 per cent of the regional GDP. It also represents a massive employment stock: in the EAC, it accounts for about **half of the total employment** and this share is likely to increase in the future. The potential for employment creation and growth is emphasised in an UNCTAD recent report (2015). While highlighting the crucial role of the service sector in African countries' economies, the report also stresses the necessity to build a coherent framework to facilitate the sector's development, which should be based on homogenisation of national and regional legal environments. The service sector is more mobile than the other sectors, justifying the need for homogenous regulation among economic organisations. In terms of labour migration, it is therefore crucial to understand whether labour migrants are participating in this dynamic sector and discuss the relevance of the Common Market Protocol framework to facilitate the sector's growth at a regional level.

Mapping migration flows and labour migration in the EAC (KG1)

Overview of migration patterns in, to, and within the EAC

The migration profiles of the countries of the EAC are diverse, with **significant differences in the volume of migration flows**. Table 2 summarises key migration statistics for Burundi, Kenya, Rwanda, Tanzania and Uganda. The characteristics of these five countries in terms of emigration and immigration differ significantly. Burundi and Rwanda in particular have a larger emigrant stock compared to the other countries (2.5 per cent and 2.7 per cent respectively) due to significant forced migration movements to neighbouring countries.

Table 2 - Migration statistics for EAC countries

|	Burundi	Kenya	Rwanda	Tanzania	Uganda
Emigration					
Stock of emigrants (2015)	284,187	455,889	315,866	294,531	736,017
Main destination countries (2013)	Tanzania, Rwanda, DRC, Uganda, Canada, Malawi, South Africa, Sweden, Belgium, the Netherlands	the United Kingdom, the United States, Tanzania, Uganda, Canada, South Africa, Australia, Germany, South Sudan, Switzerland	DRC, Uganda, Burundi, Tanzania, France, Zambia, Malawi, Canada, Belgium	Rwanda, Kenya, the United Kingdom, Uganda, Burundi, Canada, the United States, South Africa, Malawi, Mozambique	South Sudan, Rwanda, the United Kingdom, Kenya, the United States, Tanzania, Canada, South Africa, Sweden, Australia
Number of refugees (2015)	292,725[5]	7,877	286,322	6,181	6,256
Immigration					
Stock of immigrants (2015)	286,810	1,084,357	441,525	261,222	749,471
Main origin countries (2013)	DRC, Rwanda, Tanzania, Kenya, Uganda, Belgium, France	Somalia, Tanzania, Uganda, Sudan, India, Ethiopia, South Sudan, the United Kingdom, Cameroon, DRC	DRC, Uganda, Burundi, Tanzania, Kenya, Belgium, India, France, Germany, the United Kingdom	Burundi, DRC, Kenya, India, Rwanda, China, the United Kingdom, Uganda, Mozambique, the United States	DRC, South Sudan, Rwanda, Kenya, Tanzania, Sudan, Burundi, Somalia, India, Eritrea
Number of refugees (2015)	53,356	553,892	144,724	211,845	477,167

Source*: UN DESA, 2015; UNHCR, 2016; World Bank, 2015.

The relative number of immigrants in each of the EAC countries shows an evolution in the share of immigrants at different points of time (1990–2015). Rwanda was the country with the largest migrant stock in 2015, with almost 4 per cent of the population classified as migrants. Rwanda was followed by Burundi, Kenya, Uganda and Tanzania. Much more than other EAC countries, Tanzania experienced a decrease in its relative migrant stocks (from more than 2 per cent of the whole population in 1990 to 0.5 per cent in 2015). Figure 3 illustrates the migration trends over recent

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[5] In the case of Burundi, the number of refugees is higher than number of total emigrants. This is due to the use of different data sources for both numbers during a year were new significant refugee movements occurred. The estimates for total emigrant stock are therefore likely to underestimate the true number.

decades. These different patterns need to be analysed through different lenses (population growth rates, emigration flows and economic outputs) to understand the main drivers and mechanisms of immigration stocks.

Figure 2 - International migrant stock as a percentage of the total population
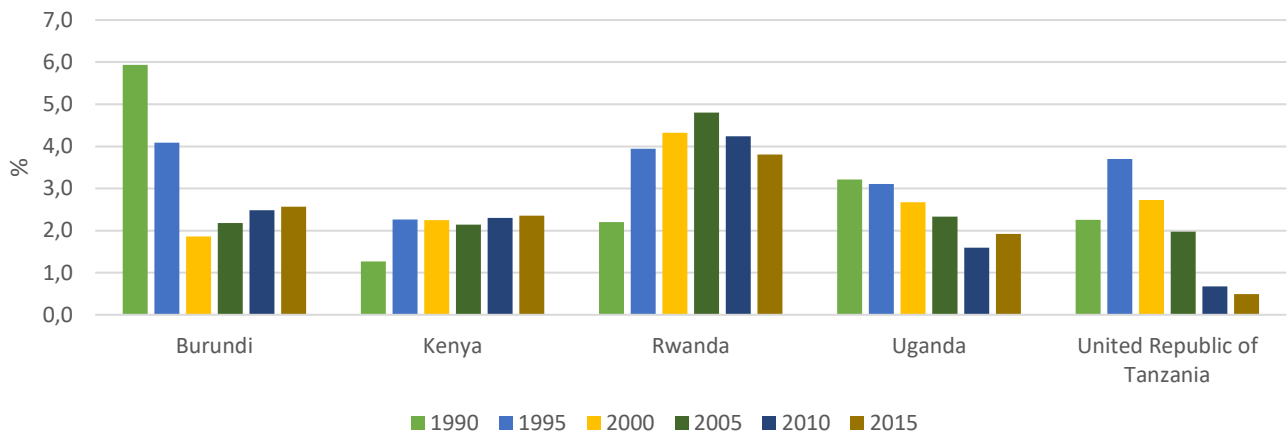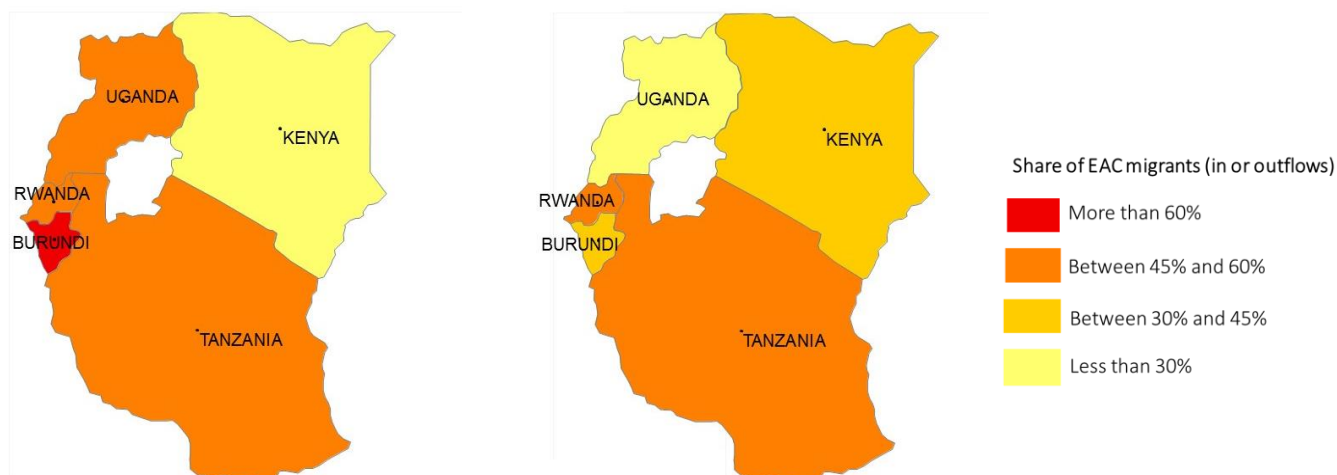

Source: UN DESA, 2015

Documenting bilateral migration patterns between the EAC countries

EAC partner countries share a **long history of cooperation** that can be traced back to pre-colonial times and that intensified in the early 20th century when they were under colonial rule. Examples of this cooperation are the railway between Mombasa in Kenya and Kampala in Uganda, built around the turn of the century, and a Customs Union between Kenya, Uganda and Tanzania established in 1919, which allowed for the **free movement of goods, capital, labour and services** (Magu, 2014; Reith and Boltz, 2011). Such developments had an impact on migration flows in the EAC context. Rural-urban migration in particular increased as cities emerged as economic centres and waged work gained more importance (Oucho, n.d.). People from Rwanda and Burundi moving to Uganda to work on coffee and cotton plantations are an early example of intra-regional labour migration. Other causes of intra-regional migration in the early and mid-20th century are famines and refugee movements in response to ethnic persecution (Black, Mclean Hilker and Pooley, 2004).

Figure 3 illustrates the strong migration linkages between EAC countries based on 2015 data. The left-hand map shows Burundi having the largest share of EAC migrants amongst total immigrants in the EAC (above 70 per cent) followed by Tanzania, Uganda and Rwanda. Kenya is more diversified in terms of the migrants it hosts with a share of 16 per cent of EAC migrants out of the total immigrant stock in the country. The right-hand map highlights patterns of the emigration destination of EAC citizens. Rwandan and Tanzanian emigrants tend to settle in another EAC country (between 45-60 per cent), while less than 30 per cent of Ugandans emigrate within the region. However, these maps, based on UN DESA data on migration flows, are likely to be biased, since they only cover formal migration and refugee stocks. In other words, the existing data is based on only the record of legal migrants and refugees that have been recognised as such.

The main push factors of migration in the EAC today remain **conflict, unemployment and poverty.** Push and pull factors also vary by location. For example, while hosting significant refugee populations, particularly in the eastern and western part of the country, Kenya also attracts migrants due to its strategic location as a regional hub in East Africa. It also attracts labour migration to urban areas and for education as well as tourism (IOM, 2015). In the cases of Rwanda and Burundi, latest migration trends are more associated with the waves of conflict the two countries faced in the early 1990s and, in the case of Burundi, with the **major refugee movements in 2015**. Both Rwanda and Burundi have the highest proportion of migrants as a share of each country's population, the majority of which likely migrated to due to conflict.

Figure 3 - Share of EAC immigrants (left-hand map) and emigrants (right-hand map) as a proportion of total EAC immigrant (emigrant) population in 2015

Source: UN DESA, 2015

Information on yearly migration flows within the EAC is not available. However, one can look at the stock migration levels from each country and disaggregate this by country of origin. Table 3 shows the bilateral migration stocks in the EAC countries as of 2015. As is evident from the table, while Kenya is the largest host of migrants from other EAC partners in the region (in absolute terms), Uganda is the largest sending country to other EAC members in absolute numbers in 2015.

In-country migration trends have not been stable in the past two decades. As shown in Figure 4, the **share of people who migrate towards another EAC country has decreased steadily in Kenya and Tanzania** between 1990 and 2015, whereas immigration patterns have been more volatile in Burundi, Rwanda and Uganda. A comparative analysis of **Figure 4** and **Figure 5** does not provide evidence that would account for a statistically significant difference between intra-EAC emigration and immigration patterns. Several variables such as political or economic situations are likely to have differentiated impacts on immigration and emigration flows. Introducing more granularity in the data will enable the research to test for linkages between migration inflows and outflows and political, economic or social outcomes.

Table 3 - Bilateral migration stocks in the EAC Countries in 2015 (formal migration)

COUNTRY OF ORIGIN	COUNTRY OF DESTINATION					EAC MIGRANTS AS % OF TOTAL EMIGRANTS
	BURUNDI	KENYA	RWANDA	TANZANIA	UGANDA	
BURUNDI		4,345	64,501	87,099	45,345	32.88
KENYA	1,032		2,581	27,247	43,512	35.45
RWANDA	64,363	6,330		581	76,861	45.76
TANZANIA	28,008	39,935	42,776		25,321	45.86
UGANDA	891	333,789	92,195	4,857		25.49
EAC MIGRANTS AS % OF TOTAL IMMIGRANTS	70.83	16.31	46.90	58.66	46.19	
IMMIGRANTS AS % OF POPULATION	2.4	2	4.1	1.3	1.5	

Source: UN DESA, 2015

The heterogeneity in the recent migration trends shows that bilateral relations matter over EAC-wide considerations. What may apply to one country (in terms of a push or pull factor) will not necessarily apply to another, thus complicating a purely regional approach to understanding EAC labour migration dynamics.

Figure 4 - Share of migrants that moved towards an EAC country (by origin): 1990 – 2015
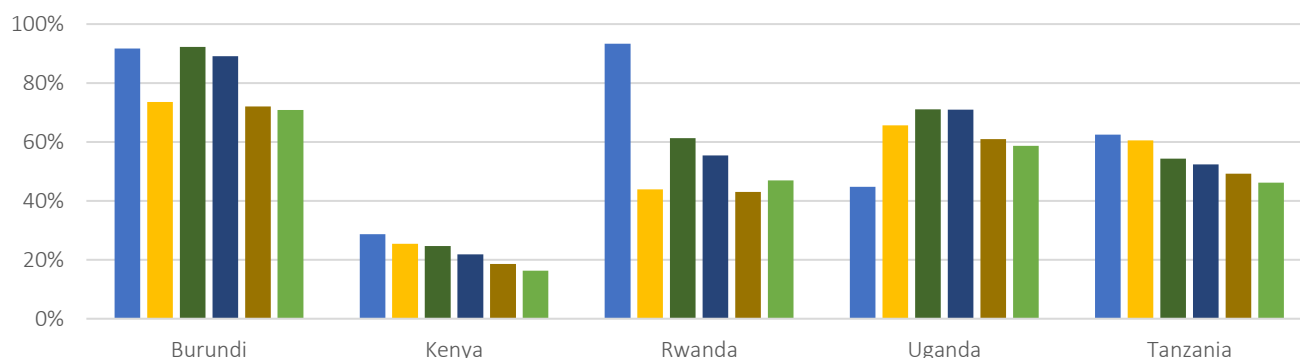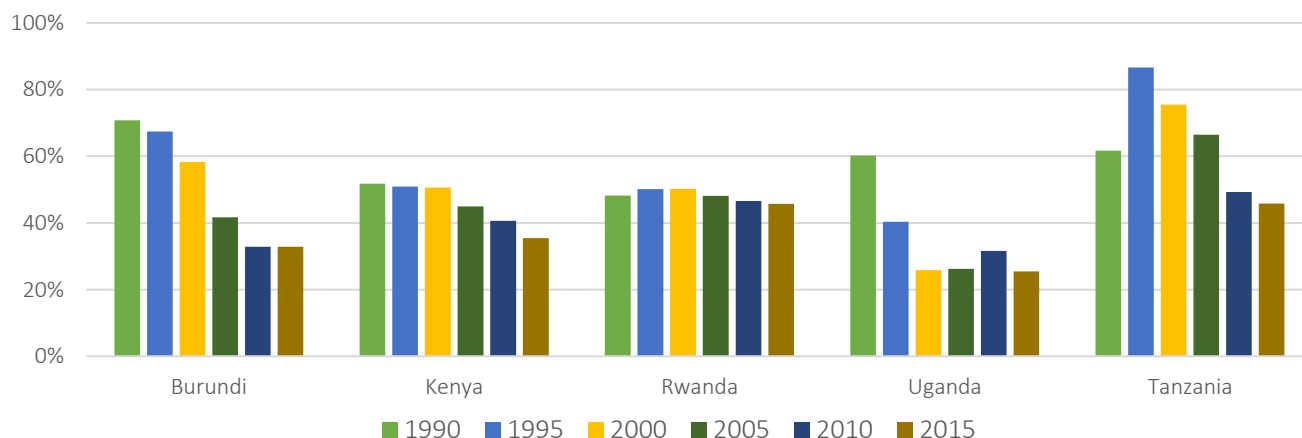

Figure 5 - Share of migrants coming from an EAC country (by host country): 1990 - 2015

■ 1990 ■ 1995 ■ 2000 ■ 2005 ■ 2010 ■ 2015

Source : UN DESA 2015

Table 4 displays the percentage change in bilateral migration stocks between 2005 and 2015. **Countries that attracted migrants from one EAC member have not necessarily been attractive to migrants from other members**. For instance, Uganda experienced a large increase in its stock of migrants coming from Burundi, while the stock of other EAC migrants remains quite stable over the same period. This heterogeneous bilateral pattern raises questions in terms of political implications. What type of responses can be provided at the regional level given that the trends are mainly defined at the national and bilateral levels? The relevance of regional policy tools therefore needs to be assessed given this context to identify potential room for designing better policy answers.

Table 4 - Change in the bilateral migration stocks between 2010 and 2015

		Country of origin					
		All	Burundi	Kenya	Rwanda	Uganda	Tanzania
Host country	**All**		-54%	33%	10%	32%	24%
	Burundi	66%		106%	13%	11%	104%
	Kenya	43%	112%		56%	14%	-5%
	Rwanda	2%	-6%	-1%		-1%	-1%
	Uganda	15%	154%	2%	-9%		-1%
	Tanzania	-66%	-81%	-6%	-96%	-49%	

Source: UN DESA, 2015

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While it is possible to map formal migration to and from the EAC countries, as indicated in the previous section, the existing data does not allow one to distinguish all types of migration, particularly labour migration. Therefore, the above statistics can only be a proxy for the significance of movements, although even extrapolating inferences might be a difficult task given the relevance of forced migration movements within the region.

Conclusion 1: Need for primary data collection to address KG1

There is **relevant and suitable data** on **intra-regional formal migration stocks** in the EAC. Existing literature and available datasets document the main trends in migration stocks with evidence on both migration worldwide and within the EAC. In other words, for each country under consideration, available data supports analysis of trends in terms of migration inflows and outflows. Moreover, it highlights the share of migrants coming from another EAC country, as well as migration evolution over the past two decades.

The EAC countries have a long history of cooperation that translates into significant bilateral migration flows. Yet, the migration patterns are varied from one country to another. Burundi and Rwanda have a larger emigrant stock compared to other countries, and migrants from these countries are more likely to settle in neighbouring countries. The ties between Burundi and Rwanda with other EAC countries are mainly due to political instability. Kenya appears to be the most diversified country in terms of migration inflows and outflows. It is the main host country in the EAC, with more than one million migrants, of which 16 per cent come from the EAC. Recent migration trends are also differentiated: Tanzania experienced a large decrease in its migration inflows from the EAC, while Burundi and Kenya have welcomed more EAC migrants between 2010 and 2015.

Despite the availability of data on intra-regional migration stocks, the nature of migration flows is poorly understood. The existing literature does not allow the research team to estimate the number of people on the move engaged in formal work. The data does not provide enough evidence to conclude on potential winners and losers in relation to migration flows in the EAC or the countries that can benefit the most from the Common Market Protocol.

Primary data collection will complement these insights by **adding granularity to the data**. Since bilateral migration stocks are known, the research team will use the collected data to **break down these stocks by migrant profiles**. In each country, demographic characteristics, education, prior and current occupation, past history of migration and many other variables will be documented through the deployment of a detailed survey.

By combining the different data sources, the research team will be able to:

1. Assess the validity of comparisons between existing data sources that document migration stocks in the EAC;
2. Distinguish between different profiles of migrants and measure labour migration in the EAC by demographic characteristics, skills and background (among others characteristics);
3. Document national specificities and analyse how they relate to the structure of the job market and the profile of the labour force; and
4. Analyse past and current trends in terms of labour migration and document the existing and missing labour ties that exist within the EAC.

Quantitative data collection will be combined with qualitative fieldwork. Key Informant Interviews (KIIs) with state and non-state actors will provide insight on the aforementioned potential measurement biases, while enabling the research team to analyse national migration frameworks. Combined with Focus Group Discussions (FGDs), KIIs will enable the research team to qualitatively assess:

1. The main trends in labour migration in the EAC;
2. The extent of migrants' economic contributions;
3. The challenges migrants are likely to face; and
4. The impact of migrant assets on their inclusion in value chains, through both national and regional angles.

Mapping labour migration: understanding skill and gender gaps (KG2)

Common Market Protocol and national labour frameworks in the EAC

The free movement of labour stipulates **that only qualified East African workers** in specific approved categories may **apply for jobs in any of the EAC member countries** in line with the laws of each country. The categories are included in Annex II of the EAC-CMP and the classification is based on the ILO's International Standard Classification of Occupations (ISCO-08). Table 5 includes the broad categories of workers approved within the EAC-CMP labour framework (all subcategories are detailed in Annex II of the EAC-CMP).

Table 5 - Main categories of work opened to EAC's workers

Major Category	Burundi	Kenya	Rwanda	Tanzania	Uganda	Mutual Recognition Agreements (MRAs)
Managers		All categories Since July, 2010			All categories Since July, 2010	
Professionals	Only some categories Since July, 2010	Only some categories Since July, 2010	Only some categories Since July, 2010	Only some categories From July, 2010 to 2015	Only some categories Since July, 2010	Accountants Architects Engineers Lawyers (bilateral MoU)
Technicians and Associate Professionals		Only some categories Since July, 2010	Only some categories Since July, 2010	Only some categories From July, 2010 to 2015	Only some categories Since July, 2010	Veterinarians Medicine (Bilateral MoU)
Craft and Related Trades Workers		All categories Since July, 2010			All categories Since July, 2010	

Note: Classification based on the International Standard Classification of Occupations 2008 (ISCO-08) Structure, Group Definitions and Correspondence Tables.

As shown in Table 5, the skills categories open to labour from other EAC countries are mostly in **professions where each country faces significant skills shortages**, namely in the **highly-skilled sector**. While there is substantial overlap, subcategories do vary from country to country. Kenya and Uganda are the most open in terms of categories and subcategories of allowed labour, while Burundi has the most restrictions. The commitments to the opening of labour restrictions to migrants from other Partner States started on 1 July 2010 with the ratification of the EAC-CMP. In the case of Tanzania, they were provisioned to be opened within a period of five years. In addition, employment in the public service was completely excluded from the provisions of free movement of workers (exceptions are possible but need to be approved by the host country).

An important aspect of the labour market integration of the EAC is **the mutual recognition of qualifications and skills across countries**. Article 11 of the EAC-CMP provisions that Partner States should *"mutually recognise the academic and professional qualifications granted, experience obtained, requirements met, licences or certifications granted, in other Partner States"; and "harmonise their curricula, examinations, standards, certification and accreditation of educational and training institutions."* Annexes II and VI of the EAC-CMP have regulations that guide mutual recognition of academic and professional qualifications.[6]

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[6] In its original form, there was substantial overlapping between the provisions made within the "*free movement of workers*" (Annex II of the EAC-CMP) and the "*free movement of trade in services and service providers*" (Annex V). In 2014, the Council of Ministers instructed that amendments needed to be made in order to address discrepancies found in both schedules and in an effort to "*delink*" Annex II from Annex V of the EAC-CMP. Currently the commitment on the movement of service suppliers requires matching commitments on the movement of workers (Cronjé, 2015).

The **Inter-University Council** is the legal institution responsible for guaranteeing **the harmonisation of the higher education systems** within the EAC. The council is in charge of enacting Article 11 of the Protocol for the Establishment of the East African Community Common Higher Education Area. The Inter-University Council for East Africa (IUCEA) Act of 2009 provides the legal and institutional framework for the harmonisation of educational accreditations within the EAC operational framework. In particular, for academic recognition among EAC partners, degrees and academic qualifications need to be granted by higher education institutions that are members of IUCEA. As stated in their objectives, one of IUCEA's goals is to *"facilitate maintenance of internationally comparable education standards in East Africa so as to promote the region's competitiveness in higher education"*.

Harmonisation of qualifying occupations has been addressed through the enactment of **Mutual Recognition Agreements** (MRAs) relating to individual regulated professions (Annex VI of the EAC-CMP). As shown in Table 5, MRAs have been signed in the category of professionals and include engineering, accountancy, architecture and, in the category of technicians and associate professionals, veterinary doctors. A number of other professions have expressed an interest in signing similar agreements but have not yet been negotiated (EAC, 2016e). Bilateral Memorandums of Understanding (MoUs) have been signed for lawyers and medical boards. MRAs are further complicated in some professions as mutual recognition of procedures (such as the case of veterinary medicine or law) need to be negotiated.

Other than descriptive reports, there is currently **no available comparable and representative data** on labour migration in the skill categories open to labour from other EAC countries. This is an important gap in the literature, as it is difficult to assess the magnitude of current migratory flows and the possible complementarity and/or substitutability of migrant workers in each country. In addition, given the overlap between the freedom of labour and freedom of services, a service provider is not categorised as a migratory movement (instead it is recorded as a service in the balance of payment). This means that an accountant in Kenya may not need to migrate to Rwanda to establish his or herself as a service provider, but an accountant in Rwanda may want to move to Kenya where the returns on labour in this profession are higher.

The service sector is booming in Sub-Saharan African and particularly in the EAC countries. The development of the sector is likely to result in a rise in employment and to have spillover effects on other sectors. The growth of the tertiary sector is correlated to the initial state of the manufacturing sector (Guerrieri and Meliciani 2005): the two sectors are interdependent and the strength of ties may result in **virtuous growth cycles**. In regards to the demand for skilled labour in the service sector, the harmonisation of professional standards is crucial in the EAC in order to align free movement of workers with the high mobility that characterises services. To maximise the benefits from the potential service-driven growth, regional frameworks should encompass national legal settings to overcome skill shortages and enhance labour mobility of workers from the tertiary sector.

There are very few sources of information available to analyse **intra-regional differences in remuneration** levels in all of the main occupations or subcategories that are open to labour from other EAC countries. **Significant differences in remuneration across EAC countries** can hamper the integration of regional labour markets (Otieno, 2015; The EastAfrican, 2013). The Wage Indicator Foundation shares and compares wages to promote greater labour market transparency worldwide (n.d.). According to the Foundation (n.d.), there is a significant difference between the monthly minimum wages of the EAC countries, ranging from US$1.6 in Burundi to US$51.2 in Kenya, US$1.61 in Uganda, US$3.10 in Rwanda and US$17.43 in Tanzania.

There is **no comparable data on wages** in any of the job categories within the EAC freedom of labour framework. Limited data on some professions were collected by the World Bank as part of the World Bank Survey of Providers of Professional Services in East Africa in 2009 (Dihel et al., 2010). These data show that Kenyan engineers, for example, are the best paid in the region when compared to other countries. This is followed by Uganda and Tanzania. This trend is maintained for lawyers. On the other hand, Ugandan accountants are the highest earners in the region followed by Kenya and Tanzania (there is no data for these professions for Burundi or Rwanda).[7] Further data on wages

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[7] It is interesting to point that, adjusted by purchasing power parity (PPP), these professions are very well rewarded in the world's adjusted payment scale. Accountants in Uganda earn (PPP-adjusted) similar to an accountant in the UK. Engineers in Kenya and Uganda are much better

disaggregated by level of education show that at all levels of education, Kenyan workers earn more compared to those in other countries. For example, a person with a secondary degree in Kenya makes US$1,837 (median monthly wage) compared to US$1,035 in Uganda, or US$466 in Rwanda. The difference more than doubles when looking at higher levels of education. A university graduate earns US$7,185 in Kenya and US$1,600 in Rwanda, or US$2,035 in Uganda. At the senior professional level, the median annual wage for Uganda is US$5,126 compared to US$10,602 in Kenya (World Bank, 2010).

Although there is not much information on skills in the categories of labour migration open to EAC migrants, a relative idea of the **differences in skill levels** in some professions for certain countries is possible. For example, Kenya has the greatest density of professionals in the areas of accountancy and law with respect to the other countries. Kenya has 14 accountants per 100,000 inhabitants, while Tanzania has 8, Uganda 2 and Rwanda 0.9. Lawyers are also more abundant in Kenya, with 19 lawyers per 100,000 followed by Rwanda (5), Uganda (4) and Tanzania (2) (World Bank Survey of Providers of Professional Services in East Africa, 2009). There is no data available for Burundi. The relative density of professionals is a good illustration of skill shortages in some of these countries. For example, as reported by the World Bank report on professional services in East Africa, 60 per cent of accountants in Rwanda are foreign.

Based on this analysis, a **selective liberalisation of the service sector and high-skilled jobs** in the freedom of labour framework of the EAC is clear. More information is needed to assess whether significant labour migration flows between EAC countries have occurred and whether these have had any significant impact on the labour markets. This is related to the current implementation of the EAC-CMP regulations. For example, while the EAC took effect in 2010, Tanzania had a window period between 2010 and 2015 for the opening of borders to the selected categories of workers.

Shortcomings of the EAC-CMP implementation have yet to be overcome. Progress is needed on the **harmonisation of skills** (as there is significant overlap between the freedom of labour and freedom of services), and there are still **significant barriers to employment,** as documented by several policy reports. Some, if not most, of the barriers are related to the bureaucratic nature of legal migration. Adding to the bureaucracy are high work-permit fees. Only Rwanda and Kenya have waived work permit fees for EAC citizens (Seatufu, 2015). Another barrier to employment is the high skilled bias of labour migration. Given the characteristics of most labour markets in the EAC, a large majority of potential employment seekers are excluded (Martin, 2012). Finally, denying students the possibility of working in their host country is limiting a potential untapped market of future professionals.

Understanding women's role in labour migration

Africa and the EAC in particular have an increasing participation of women in international migration movements. In all five countries, the **composition of immigrant stock by gender is relatively equal**: according to UN DESA the share of females in migrant populations is around 50 per cent. Figure 6 provides a breakdown of migrant stocks by gender. While there have been significant changes between 1990 and 2015 in the volume of migrants across EAC countries, it is worth noting that the ratios remained balanced between males and females. Importantly, most migration of women in Africa tends to be at the regional or sub-regional level (Masabo, 2015). While skill gaps in the EAC can be analysed through the legal system and harmonisation processes, female migrants' economic contribution is not inscribed in a policy framework *per se*. This accounts for the lack of data: women are officially categorised by their migrant status or occupation level and not their gender. However, it is very likely that women play a specific role in labour migration patterns and participate in the value chain in a different manner to men.

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rewarded (PPP adjusted) than they counterparts in England or Germany. Tanzania engineers, for example, make a better living than their counterparts in Mexico when adjusting wages by purchasing power parity (World Bank, 2010).

Figure 6 - Migration stocks in EAC countries of destination by gender (1990 – 2015)

Female migrants often have to integrate into **a gendered labour market**. Most of the studies that document the occupational gaps between male and female migrants focus on Latin America (Fleury, 2016) and highlight the high level of female migrants doing domestic work. This result needs to be tested in the context of the East African labour migration. The "*global care chain*" hypothesis – as a country develops, its demand for migrants' domestic work increases (Ghosh, 2009) – is a relevant lens through which to investigate females' economic contribution. In one recent study, Ruiz and Vargas-Silva (2017) find that refugee migrants have an impact on the intra-household allocation of labour of host communities. In particular, they find that in Kagera, a region of Tanzania, more educated women (literate vs. illiterate women) benefit from the presence of refugee migration by being able to dedicate more time to outside paid employment, a result consistent with the "*global care chain*" hypothesis. Their study, however, does not identify the gender composition of migrants taking new roles in the host society.

As explained by Petrozziello (2013), female migrants can suffer from **a dual discrimination** in the labour market. Several studies, such as Siphambe and Thokweng-Bakwena's (2001) in Botswana, account for **gender wage gaps** and measure the differential recognition of skills between men and women that interact with discriminations against migrants. Women are more vulnerable and more likely to face abuse in their workplaces. Existing gender norms interact with migrants' lack of awareness of their rights. As explained by Masabo (2015), women tend to be more exposed to irregular migration due to male biased admission policies.

However, female participation in the labour market can have **significant implications on global economic outcomes** and **inclusiveness of growth**. Studies document the **higher likelihood of females to send remittances** than males. Collinson, Tollman, Kahn, Clark, & Garenne (2006) conducted a study in South Africa which concludes that men were 25 per cent less likely to remit than women. The aims associated with remittances can be gender specific. As documented by Taylor & Martin (2001) (in Fleury, 2016), women are more likely to spend more on **children's education** and **health** when they reach higher income levels. Finally, female migrants that return home are more empowered than non-migrants and enjoy a higher socioeconomic status both in subjective and objective terms (Masabo, 2015 and Siegel et al., 2015). In other words, females' economic behaviours can have long-term effects on resilience and inclusive development.

Conclusion 2: Need for primary data collection to address KG2

The **EAC legal system** that frames formal labour migration flows has allowed the research team to document the **set of opportunities that formal workers** can access at the regional scale. The **Common Market Protocol** framework provides a relevant basis to analyse the skill shortages in the different countries. Among the EAC countries, Kenya is the most open to international workers. On average, workers are also better qualified and better paid in this country. In regards to the educational system, harmonisation between the countries needs to be deepened in order to build a more integrated regional labour market.

While the legal framework provides relevant insights on the supply and demand for formal labour in the EAC country, this structure mainly pertains to **highly-qualified work**. Labour migration of less-qualified workers is still poorly understood, and the skill gaps need to be investigated with a particular focus on **under-skilled jobs**.

There is also a significant **lack of data and evidence on gender gaps**. Existing data do not distinguish between male and female engagement in formal work. Women represent half of the migrant flows in the EAC. However, it is unlikely that they represent half of the migrant workforce. Even when engaged in economic activities, women are often vulnerable and face discrimination. Moreover, the literature on female employment in developing countries documents the potential positive impacts of female economic participation on stabilisation of livelihoods. Female migrants' economic participation remains a major data gap to documenting labour migration patterns in the EAC and their potential implications on inclusive growth.

Future data collection aims at filling these gaps. Firstly, qualitative data collection, through KIIs and FGDs, will provide insight into the **participation of target groups,** such as **women** or **under-skilled populations, in the labour market**. Regarding the situation of women, the main goal will be to document to what extent female migrants differ from males in terms of labour market participation. The research team will work with key stakeholders to identify whether women are more likely to be involved in the informal sector. Women's role in the value chain will be put under particular emphasis. Qualitative interviews will also provide evidence to map the main manpower needs in each EAC member country, and to what extent migrants' can be absorbed by the labour market, given their initial skills. The qualitative part of the survey will also aim at documenting the legal frameworks that can hinder efficient labour flows and convergence paths between countries.

Secondly, quantitative data collection will document migrants' skill levels and occupations. This data will be put in perspective with both qualitative data and existing quantitative data on the labour market, for instance, national employment rates or level of education. Primary data collection will enable the research team to build a **multi-layered skill-gap model**. The model will encompass cross-country comparisons, both in terms of skills and female economic contribution and in-country dimensions. The second dimension will be based on a **comparison of the various levels of economic inclusion** – for instance, employment status, sector and remittance patterns – between the different categories of migrants in each EAC member country. Moreover, an econometric analysis will be performed to estimate to what extent openness of labour legislation between EAC countries is linked to migration patterns. To that end, national representative surveys will be combined with the new data, such that the rapid survey will enable the research team to weigh the data according to the proportion of different migrant types within the population.

Understanding and mapping refugees' and irregular migrants' labour and economic contributions (KG3)

The current migration situation in the EAC is complex and includes **various forms of migration, such as flows of refugees, IDPs, and regular and irregular migrants** (Kanyangoga, 2010; EAC Secretariat, 2011). This section focuses on refugee and irregular migrant flows: these two groups are combined in this part of the analysis as they "*increasingly make use of the same routes and means of transport to get to an overseas destination*" (UNCHR, n.d). In other words, while refugees cannot be categorised as irregular migrants, they are often part of mixed migration flows and share a similar pattern of their migration journeys.

Irregular migration in the East African Community

Due to its nature, irregular migration is inherently difficult to measure, which makes the identification of characteristics and remittance flows extremely challenging (Koser, 2007). Despite the lack of reliable data, **human trafficking and smuggling** are assumed to constitute a large and increasing part of irregular migration flows in the East African Community (UNODC, 2009). All EAC countries have become *"major transit hubs for irregular migration and smuggling networks from the Horn of Africa"* (Majidi and Oucho, 2016). Considering that skilled labour migrants may move more freely between EAC countries, one can suspect less skilled individuals to constitute the largest share of irregular migrants. According to the International Organisation for Migration (2008), employment in the domestic, service and hospitality sectors constitutes many victims of trafficking from the EAC. As noted by Majidi and Oucho (2016), the lack of a standardised data collection system in the region hinders comparative measurement and possible policy harmonisation.

Irregular migrants are defined as "*persons who, owing to illegal entry or expiry of their visa, lack legal status in transit or host country*" (UNU Jargon Buster, n.d.). They include "*migrants who infringe on a country's admission rules and any other person not authorized to remain in the host country*" (UNU Jargon Buster, n.d.). Human trafficking and smuggling are the most common forms of irregular migration. Human trafficking is defined as the "*recruitment, transportation, transfer, harbouring or receipt of persons, by means of the threat or use of force or other forms of coercion, of abduction, of fraud, of deception, of the abuse of power or of a position of vulnerability or of the giving or receiving of payments or benefits to achieve the consent of a person having control over another person, for the purpose of exploitation [… including] the prostitution of others or other forms of sexual exploitation, forced labour or services, slavery or practices similar to slavery, servitude or the removal of organs*" (UNODC, 2004, Annex II). In contrast, human smuggling is defined as "*procurement, in order to obtain, directly or indirectly, a financial or another material benefit, of the illegal entry of a person into a State Party of which the person is not a national or a permanent residen*t" (UNODC, 2004, Annex III). Hence, a key distinction made is one of choice: individuals voluntarily participate in the smuggling process, while the human trafficking occurs against their will. It is crucial not to conflate the two while recognising that there are cases in which the boundaries can be blurred, with smuggling turning into trafficking (Koser, 2007). This notably occurs when exploitation – including labour exploitation – occurs in transit. While the literature on the costs of irregular migration (for example welfare and income losses for regular labour migrants, wage discrimination, denial of social and legal rights as well as other forms of discrimination against irregular and unskilled migrants) could be identified easily for other geographical areas, studies in the EAC appear to be limited. In general, irregular migrants are vulnerable to many risks, which is particularly true for clients of smugglers and victims of human trafficking. In addition, Akinboade (2014) points out that irregular migration can lead to revenue losses.

A 2009 UNODC study discusses irregular migration in East Africa, including in the EAC countries. Kenya is identified as an origin, transit and destination country for irregular migrants, particularly from the Horn of Africa. Tanzania is an important transit country for irregular migrants from the Horn of Africa. In addition, stakeholders are increasingly concerned about the human trafficking situation in Uganda (UNODC, 2009; EAC Secretariat, 2011; Horwood, 2015).

UNODC (2009) identifies reasons why irregular migration continues despite various efforts by governments and international and non-governmental organisations to eradicate it. Firstly, **it is difficult to distinguish irregular from regular migration flows**, which are on the increase because of economic integration and open borders. Secondly, difficult living conditions, including conflicts and high rates of unemployment are considered the most important drivers of irregular migration in the region, leading individuals to move to places perceived to have more opportunities. This seems particularly true in a region that is characterised by political instability and conflict. Thirdly, trafficking networks appear to be becoming more organised, while regulations lack adequate harmonisation to address the issue effectively. This is exacerbated by a lack of awareness on part of the local authorities and populations (UNODC, 2009; Akinboade, 2014).

The US Department of States Trafficking in Persons Report 2016 indicates to what extent irregular migration is an issue in individual countries by assessing **standards of the 2000 US Trafficking Victims Protection Act** (TVPA). It distinguishes between TIER 1 (fully meeting the minimum standards), TIER 2 (not fully meeting the minimum standards, but making an effort to do so), TIER 2 Watch List (same as TIER 2 with increasing numbers of trafficking victims and failure to provide evidence for commitments and efforts made), and TIER 3 (not fully meeting minimum standards and no effort to do so). **None of the EAC countries fully meets the minimum standards of the TVPA**. Kenya and Uganda are placed on TIER 2, Rwanda and Tanzania are placed on the TIER 2 Watch List and Burundi is placed on TIER 3 (US Department of State, 2016).

Collecting reliable data regarding irregular migration flows is difficult for several reasons. One issue is that family members are often involved in irregular migration processes, both trafficking and smuggling, and therefore conceal it from the authorities (UNODC, 2009). Nevertheless, UNODC (2009) identified key trends with regards to human smuggling in East Africa. Firstly, there is an increased demand for smugglers as border controls improve. Secondly, smuggler networks are becoming increasingly organised and professional. Thirdly, as the smuggling process becomes more difficult, it becomes more dangerous for migrants.

Women are particularly vulnerable to these kinds of migration avenues. As noted by Masabo (2015), gender norms and male-biased admission policies expose women to "*irregular migration, human smuggling and trafficking*" (Masabo, 2015). In addition, human trafficking of women for sexual exploitation increases as the regional tourism and sex industry grows (UNODC, 2009).

One can assume that the capitals of the EAC countries (Bujumbura in Burundi, Nairobi in Kenya, Kigali in Rwanda, Dodoma in Tanzania, and Kampala in Uganda) are irregular migration hubs as they form the economic centre and are at the same time host many refugees and asylum seekers. In addition, refugee camps are popular hubs for human smuggling and trafficking networks. Annex J provides an overview of refugee camps in the five EAC countries, among which are some of the largest refugee camps in the world, such as Dadaab and Kakuma in Kenya, Nyarugusu in Tanzania and Adjumani and Nakivale in Uganda (Horwood, 2015; RMMS, 2016a; RMMS, 2016b; UNHCR, n.d.).

Representatives of the EAC and International Organisations such as IOM are aware of the challenges irregular migration in the region poses and call for comprehensive and joint measures to address irregular migration (EAC, 2011; UNODC, 2009). In order to do so, however, an increased understanding of the trends is necessary.

Refugee migration in the EAC

Refugee migration is a major pattern that characterises overall trends in all of the EAC countries. In 2015, the proportion of refugees in the migrant population was above 50 per cent in Kenya and between 25 and 50 per cent in Uganda and Tanzania (Figure 7). Rwanda and Burundi are different in terms of migrant profiles: less than 20 per cent of immigrants were refugees in 2015; while Tanzania remains in an in-between position (35 per cent). Details of the main refugee and person of concern populations as measured by UNCHR are available in Annex K.

These figures have changed greatly in the past decades. **Kenya experienced a large increase in its proportion of refugees**: in 1995, only 37 per cent of migrants settled in Kenya were refugees. Twenty years ago, refugees in the EAC were mainly

located in Tanzania, where the share of refugees in the total population of migrants was around 75 per cent. While refugee inflows remain quite stable in Burundi, Rwanda and even Kenya, the overall pattern has significantly changed in Uganda and Tanzania between 2005 and 2015. After experiencing a large decrease in its number of refugees between 2005 and 2010 (-14 per cent), Tanzania's refugee inflows have been stable between 2010 and 2015. **Conversely, Uganda experienced a higher increase in its proportion of refugees** in the past five years. These disparities need deciphering and comparing to the national frameworks that regulate refugee entries and the functioning of the labour market and growth dynamics.

Figure 7 - Share of refugee as a proportion of the total stock of migrants in the EAC
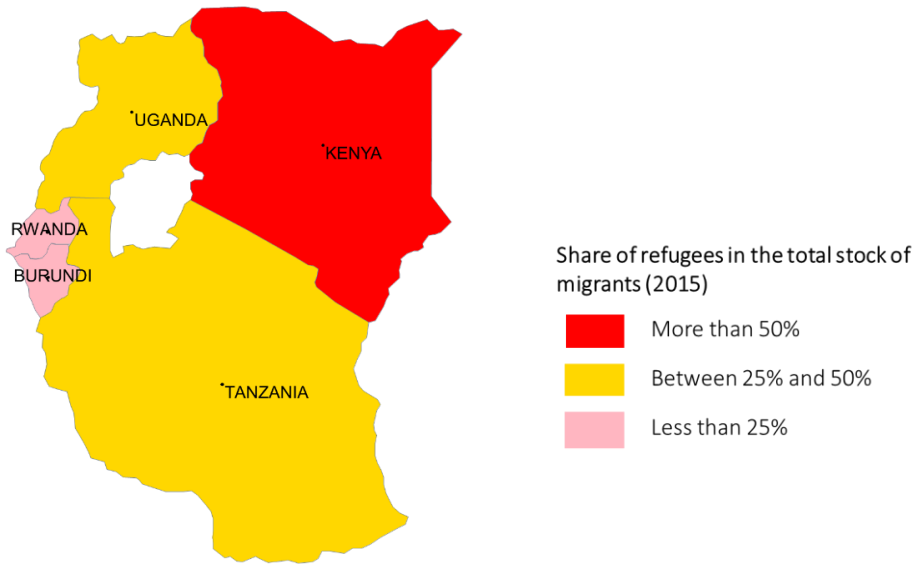
Source: UNHCR, 2015

The share of international refugees in East Africa remained stable, around 25 per cent, over the last two decades. Today, 38 per cent of the refugees coming from outside the EAC are settled in Kenya, while Tanzania hosts more than half of refugees who moved from and to an EAC country (Table 6).

These patterns suggest that migration trends, and their relation to the labour market, should be analysed differently depending on the country in question.

Table 6 sheds light on the large number of refugees from Somalia, South Sudan and Democratic Republic of Congo (DRC): **the region hosts more than 1.4 million refugees coming from outside the EAC**. Kenya is the first destination of refugees from other African countries. Somalis constitute the vast majority of refugees in Kenya, at around 70 per cent of the total refugee population, followed by the South Sudanese (20 per cent), Ethiopians (around 4 per cent) and other refugee populations from the DRC, Sudan, Burundi, Uganda, Eritrea and Rwanda. In Kenya, refugees and asylum seekers are officially required by national regulation to stay in refugee camps to access assistance. In practice, settlements of refugees and asylum seekers in Nairobi (with a population of 57,420 in mid-2015) and other cities have also occurred and are generally accepted (DAI Europe & EuroTrends, 2015), although they have been challenged in the past.

Refugees are governed by directives and changes of legislation that often **restrict them from moving out of the camps**. The case of Kenya is telling: in 2012, the Government decided to shut down all registration and service provisions for urban refugees and force them the return to the camps (Samuel Hall, 2015a). Such directives weaken refugees' self-reliance and make them especially vulnerable.

One key consideration is that, in most cases, **refugees do not have the right to work** and to engage in the formal sector. However, it does not imply that refugees do not work: they can be active in the informal sector and have livelihoods activities. Ruiz and Vargas Silva (2016) found that in Tanzania, immigration of refugees had an impact on the labour

allocation of citizens across economic activities. Refugee presence also encourages the flows of foreign aid and infrastructure investment. In fact, Maystadt (2011) and Maystadt and Duranton (2014) found that the refugee inflow improved the welfare of the hosting population by reducing poverty and transport costs as a result of increased road building. These activities are difficult to measure in terms of magnitude, and hence of implications. Furthermore, as noted by Samuel Hall (2016) in a market assessment of Kakuma refugee camp in Kenya, the lack of economic opportunities weakens already vulnerable groups such as recent arrivals or women. In spite of this lack of formal opportunities, refugees are often engaged in other types of activities, such as self-owned businesses, that are well connected to host communities (World Bank, 2016). As noted by the World Bank, Kakuma refugee camp is not isolated from host populations: economic, social and cultural interaction contributes to framing the camp as a very specific economic environment.

The case of Uganda is specific since **refugees are allowed to move and to work**. This system of work permits enables refugees to "*become productive members of their communities*" and participate in integration dynamics (Samuel Hall, ReDSS (2015b), particularly in the agricultural sector. A recent report on the impacts of Ugandan refugee policies exhibits positive impacts of the legal framework on refugee livelihoods (World Bank, 2016). While accounting for the difficulties faced by refugees in finding employment, they estimate that almost 43 per cent of refugees are actively engaged in the labour market. 12 per cent of them are working in the formal sector, and 31 per cent are self-employed. A wider range of opportunities is found in Kampala, in the trade sector, compared to smaller cities. However, most of the jobs occupied by refugees are characterised by low incomes and job insecurity. The Ugandan Refugee Act results in more interdependence between refugees and host communities and contributes to strengthening the ties between these two social groups.

Table 6 - Bilateral refugee stocks in 2016

			Country of destination					
			Burundi	Kenya	Rwanda	Tanzania	Uganda	Total EAC
Country of Origin	EAC countries	Burundi		848	70,848	155,755	26,256	**253,707**
		Rwanda	304	813			14,714	**15,831**
		Uganda		637				**637**
		Total EAC	**304**	**2,298**	**70,848**	**155,755**	**40,97**	**270,175**
	Other countries	Somalia		41,792		150	2,772	**44,714**
		South Sudan		95,671			199,359	**295,03**
		Ethiopia		21,229				**21,229**
		Democratic Republic of Congo	53,029	12,046	73,864	55,803	201,782	**396,524**
		Sudan		3,419				**3,419**
		Eritrea		1,229				**1,229**
		Other	23	80	12	137	7,336	**75,88**
		Total Other	**53,356**	**553,892**	**144,724**	**211,845**	**477,167**	**1,440,984**
Share of refugees from the EAC			*0%*	*1%*	*26%*	*58%*	*15%*	
Share of refugees among migrants			*4%*	*38%*	*10%*	*15%*	*33%*	

Source: UNHCR, 2015

The aim of this present study is to **document economic contributions of regular and irregular migrants** as well as of refugees in the EAC, and investigate labour market reaction as a function of the number of refugees in each country.

The **current unrest in Burundi has led to new refugee movements out of the country**, while large numbers of Burundians are also still displaced due to prior conflicts. According to UNCHR, there were **more than 250,000 Burundian refugees in the EAC** in 2016. As was the case during the 1972 civil conflict (Fransen & Ong'ayo, 2010), Tanzania hosts the largest share of these refugees, and this situation is very likely to affect the functioning of labour markets and of economic inclusion patterns in this specific host country. Past conflicts in Rwanda were the origin of large migration flows in the 1990s. The majority of Rwandan refugees (85.6%) still live in the DRC, while numbers in Europe and North America are

relatively small. Comparing these numbers with the World Bank data, it appears that large shares of the Rwandans in Uganda, Burundi and Tanzania may not be recognised refugees. While there are no data to show this explicitly, this may be a sign of other reasons for migration, such as work.

Assessing the economic contribution of irregular migrants and refugees

Refugee migrants engage – both regularly and irregularly – in labour markets of the hosting economy. In Tanzania, for example, reports suggest that in areas close to camps, the wage rate for casual work decreased by 50 per cent in areas more populated with refugees (Whitaker, 2002), and there is evidence that the refugees substituted for local casual workers (Ruiz and Vargas-Silva, 2016).

This study is an opportunity to document the **economic contribution of refugees and their roles in the value chain**, building on the "*refugee economies*" research strand mostly recently developed by Betts et al (2014). This question of refugees' economic contribution is at the crossroads of several key challenges faced by the EAC countries in the past decades, such as inclusive growth, poverty reduction, political stability or conflict resolution. Few studies have analysed the economic contribution of irregular migrants in East Africa so far in a quantitative perspective. However, qualitative insights from aforementioned studies conducted by Samuel Hall point out the major role of employment in refugees' livelihoods and self-reliance (Samuel Hall, 2015b; Samuel Hall 2016).

Refugee settlements can have positive impacts on local communities through the channel of aid programmes. The presence of refugee groups can trigger an economic stimulus stemming from an increased demand for food, shelter materials or basic commodities (UNCHR Standing Committee, 2017). The presence of refugees is often accompanied by humanitarian programmes, and the aid provided to this target group is likely to benefit host communities. Indeed, refugee settlements are often located in poorer areas, and their presence attracts more development agencies that also target host communities in their assistance programmes.

Aid programmes that focus on refugees can have **positive spillover effects** and contribute to increasing the welfare of both refugees and locals. A recent study conducted by Taylor et al. (2016) measures the implications of humanitarian aid provided to refugees on host communities. They estimate that the arrival of further refugees raises host communities' total real income more than the dollar value of the aid the refugees receive in a 10-kilometer radius around the camp. These insights highlight the potential opportunities to strengthen inclusive development patterns at the local level.

Measuring 'hard-to-reach' populations' economic contributions is not easy, and lack of data is the main hindrance to investigate such questions. However, identifying the specific features of refugee groups or of undocumented migrants is a necessary first step to discussing their inclusion in the labour market.
As noted by Werker (2007) it is unlikely that refugees' demographic characteristics mirror the socio-economic structure of their origin country. Based on an analysis of the camp of Kyangwali in Uganda, he highlights the different elements that make refugee camps unique in terms of markets. First, **refugees are restricted in terms of movement,** which inhibits their inclusion in a large-scale economic framework and therefore forces them to deploy their professional skills in very limited areas**.** This factor, combined with the specific institutional framework that prevails in refugee camps and the aforementioned demographic specificities, contributes to **shaping the refugee camp as an isolated economic market**. Taking stock of the **"***infringements on refugees' economic freedom***"**, Werker explains to what extent this unique labour market, characterised by its own market dynamics, **results in major economic distortions** that affect the whole labour market. South-south refugee migration is specific since it consists of a large number of individuals aiming to include themselves in small-scale economic networks. In other words, refugee flows in countries such as the EAC can be considered as exogenous labour demand shocks on weakly integrated value chains. Therefore, it is likely that refugee economic participation triggers strong spillover effects on host communities (Stark, 2004). While the existence of these effects has not been assessed in East Africa, studies provide conceptual indications on the mechanisms that are likely to occur. As noted by Connor (2010), "*refugee gaps*" can stem from the economic participation of these groups. Analysing the labour market inclusion of refugees in the United States, he shows that **refugees are likely to be underpaid**

compared to the native population and to be employed in specific sectors, in spite of the fact that there is no evidence of an "*employment gap*". In other words, while activity rates and employability can be close between native and refugee populations, the working conditions differ. These gaps need testing in the context of South-south refugee flows. Existing datasets on refugee stocks in the EAC can be compared to data on remittance flows. Figure 8 exhibits a **positive correlation between the share of refugees in the proportion of the migrant stocks and the volume of remittance outflows** in each country under study, between 2010 and 2015. No causal link can be drawn from it; however, it allows for the formulation of hypotheses to assess the economic participation of migrants. One assumption is the active economic involvement of refugees. As the refugee share of the migrant population increases, the total volume of remittance outflows goes up. Further research is therefore needed to identify the main channels that account for the possible strongest linkages between refugees and their origin countries.

Figure 8 -Refugee share in migrant stock and remittance flows in the EAC (2010 - 2015)
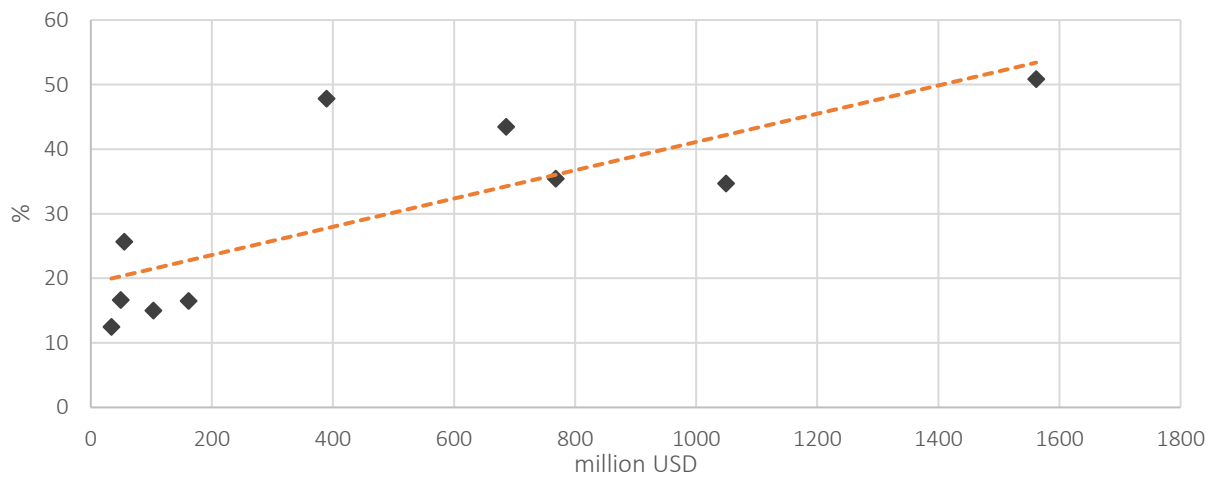
Source: UNHCR, 2015; World Bank 2015

The impact of irregular migrants' or refugees' economic participation needs assessing with regards to the host communities' working conditions. Borjas & Monras (2016) highlight a phenomenon of **competition effects with workers** and argue that migrants' economic contribution **is not neutral** and has strong **distributional effects.** This result is worth testing at the scale of the EAC.

One key challenge when analysing irregular migrant and refugee flows in East Africa is to assess these potential distributional effects and to understand to what extent they can contribute to enhancing inclusive growth through well-targeted public policies. This present study builds on Jacobsen (2002) who identifies the **economic opportunities that refugees can bring to the host community**. These opportunities need to be considered from a long-term perspective, while the burdens and challenges associated with population flows are immediate. One answer to reconcile short-term challenges and long-run economic benefits is to triangulate labour market programs. Involving NGOs and international organisations to support states to promote inclusive programmes for refugees and to help them meet their specific needs is considered by the author as a major channel to address time frame issues.

These results stress the need to conduct a rigorous mapping of the actors involved in the field. Identifying the main stakeholders that are involved in refugees' programmes for instance will enable the researchers to decipher between the legal frameworks in all of the five countries and to map the interactions between the state, workers (citizens, migrants or refugees), and third parties (NGOs, CSOs, international organisations for instance). This approach at a national level is a prerequisite to be able to draw comparisons between the EAC countries and to identify room for better labour market integration at the regional scale.

Conclusion 3: Need for primary data collection to address KG3

With regards to the measurement of economic engagement of irregular migrants and refugees in value chains, significant data gaps hinder a comprehensive analysis of the main patterns. Indeed, evidence is lacking to estimate the number of irregular migrants, but also to investigate to what extent those migrants and refugees are contributing to the informal labour market.

In the case of irregular migrants, the lack of evidence mainly stems from **the difficulty of estimating the size of irregular migration flows**. Moreover, economic participation of this group of migrants is largely informal. Indeed, Uganda is the only country that allows refugees to formally participate in the labour market. Besides the fact that they cannot access the formal labour market, refugees often engage in livelihood activities, and theoretical studies show that this type of informal work is likely to have spillover effects on local markets and on host communities.

Moreover, data on refugee and irregular migrant stocks lack granularity. At this stage, it is difficult to find robust estimates of the number of women and children that are part of these flows. However, the demographic characteristics of these groups are likely to have implications in terms of poverty dynamics. The size of the households directly affects economic choices and participation in income-generating activities. The research team aims to investigate this dimension in the further stages of the study to better understand the links between non-formal labour engagement and household living conditions.

Measuring irregular migration flows is one of the main priorities for the upcoming fieldwork. Unlike other knowledge gaps, where existing data provide the researchers with a consistent frame to draw first insights from and anchor data collection, **there are no measurements of irregular migration flows** in the EAC.

This data gap does not imply that there is no foundational data to build upon for data collection on irregular migration patterns. Since available datasets provide the research team precise measurements of migration stocks, the sampling methodology will enable the researchers to document the **ratio regular vis-à-vis irregular migration** in the sample. Parts of the questionnaires will identify the likelihood to be recorded by official institutions, such as UN-DESA or UNCHR, for each of the interviewees. Reweighting statistical procedures will be implemented to derive estimates of the number of irregular migrants in the EAC.

Existing data on refugee stocks in the EAC enable one to map the main host and origin countries as well as the volumes of individuals in the studied country. Primary data collection will enable the researchers to document better the **profiles of refugees** and to measure demographic data of refugee populations, including **gender, age or education variables.** By cross-referencing the existing figures on refugee populations in the EAC with the collected data on economic activities, the research team will estimate economic contributions of irregular migrants and refugees and assess the channels through which irregular migrants' or refugees' activity contributes to enhancing inclusive growth and stabilisation of livelihoods. Data collection also aims to identify the main challenges faced by irregular migrants. The functioning of the labour markets will be assessed, including both irregular migrants' or refugees' participation and the hindrances that limit their economic inclusion. The researchers' choice to conduct the survey in migration hubs will provide insight into the impact of irregular migration on host communities. To that end, the researchers will develop an econometric model aimed at comparing economic outcomes, such as employment rate, income level or vocational skills, in regions that are characterised by different volumes of irregular or refugee population, everything else being equal.

Qualitative data collection will enable the researchers to analyse quantitative data through the lens of key stakeholders' views and interventions. Indeed, while **measuring the proportions of irregular migrants and refugees among the overall stock of migrants**, the researchers will need to understand what types of actions are led by both state and non-states stakeholders to understand the main dynamics at stake. Civil Society Organisations' involvement will also be assessed through KIIs and FGDs. The main conclusions from these interviews will be compared from one country to another to bring out potential shared patterns or differences. Hence, putting qualitative and quantitative data collection in perspective will provide the research team with strong evidence to submit policy recommendations that have the potential to transform irregular migrant and refugee inflows into an economic asset.

Mapping remittance flows in the EAC (KG4)

Remittance inflows, outflows and balance

The fourth knowledge gap relates **to remittance flows, measurements and implications on host and origin communities.** In volume, Kenya receives the most remittances (1,561 million USD in 2015), followed by Uganda (1049 million USD in 2015), and Tanzania (389 million USD in 2015) (Table 7). Remittance inflows to Burundi and Rwanda are smaller in volume (49 and 161 million USD in 2015); however, these two countries receive larger inflows in terms of GDP share (Figure 9). Remittance inflows increased between 2012 and 2015 and are now lying above 3 per cent of GDP in Rwanda and above 2 per cent in Burundi. Although Kenya and Uganda are the two main receivers in volume, the relative amount decreased since 2012: remittance inflows lie below 1 per cent of GDP in 2015 for the two countries. Tanzania remains in an in-between position in absolute and relative terms.

In terms of remittance outflows, Tanzania sent the highest volume in 2015 (586 million USD), followed by Kenya (319 million USD), Rwanda (256 million USD), Uganda (176 million USD) and Burundi (66 million USD). As a proportion of national GDP, remittance outflows are the largest in Uganda (3.8 per cent of GDP) (Figure 9). In Kenya, Burundi, and Rwanda, remittance outflows lie around 2 per cent of GDP.

Table 7 - Remittance inflows and outflows in the EAC: 2010 - 2015

	2010	2011	2012	2013	2014	2015
Inflows (million USD)						
Burundi	34	45	42	49	49	49
Kenya	686	934	1228	1338	1441	1561
Rwanda	103	171	156	170	170	161
Tanzania	55	76	75	59	59	389
Uganda	768	949	977	932	1029	1049
Outflows (million USD)						
Burundi	11	18	16	46	47	66
Kenya	489	564	614	266	285	319
Rwanda	82	92	88	184	212	256
Tanzania	224	286	310	516	555	586
Uganda	235	190	287	136	150	176

Source: World Bank - Bilateral Remittance Matrix (2015)

Figure 9 - Remittance inflows and outflows in the EAC (2010 - 2015)
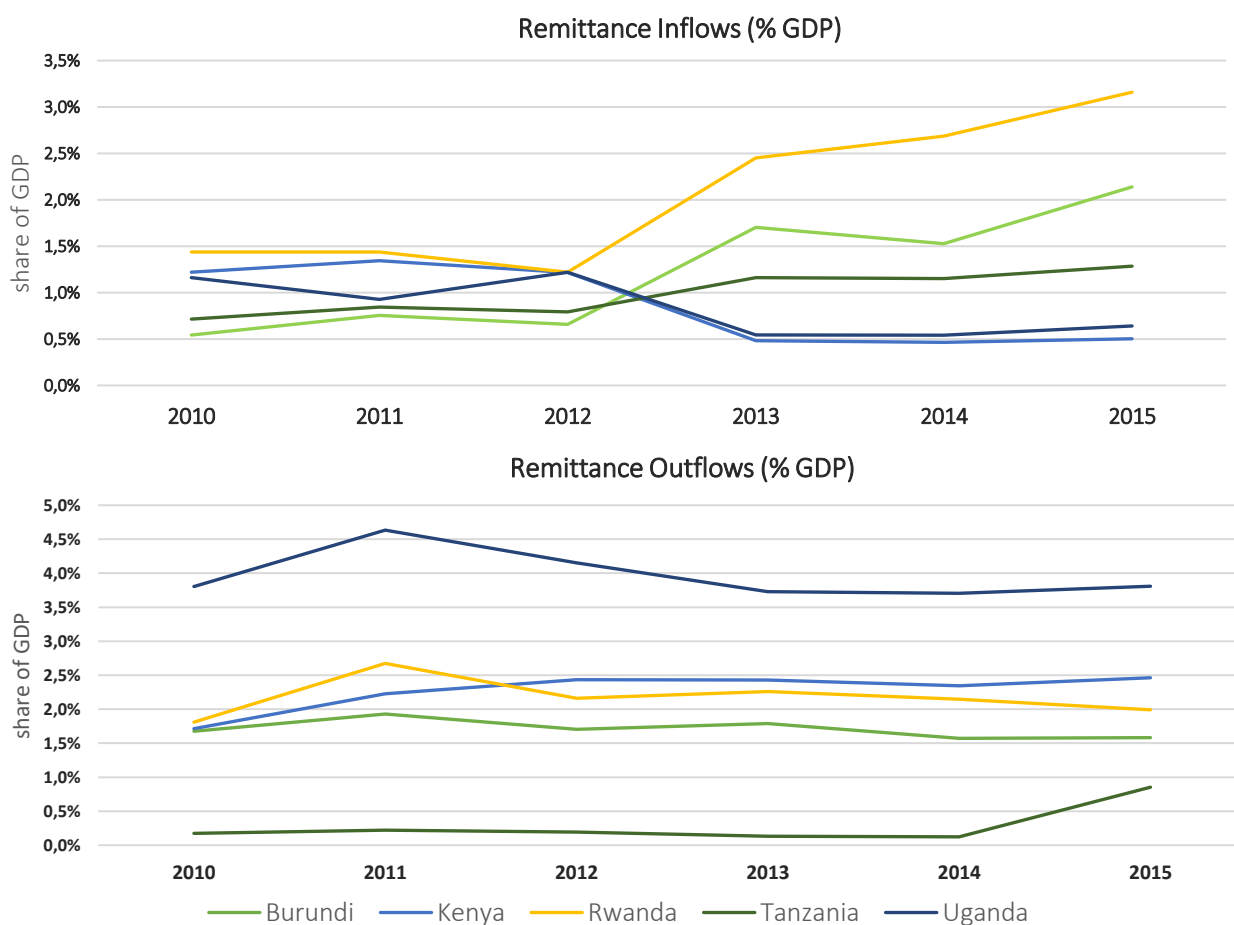
Source: World Bank - Bilateral Remittance Matrix (2015)

The **stability of remittance outflows** needs investigating against recent migration patterns in the EAC. When considering paths for inclusive growth, income and revenue stability are a key enhancing factor. In other words, this study aims to introduce more granularity in the data to test to what extent remittance outflows interact with specific migration patterns and labour inclusion to understand in depth how their dynamics can participate in improving resilience in origin countries.

Remittance flows in the EAC

Remittance inflows and outflows exhibit very different composition patterns in EAC countries. Figure 11 displays the share of remittance that is sent to (outflows) or received from (inflows) other EAC countries between 2010 and 2015.[8] On average, intra-EAC remittance inflows account for 28 per cent of total inflows from the five EAC countries. Burundi is the country that receives the larger share of remittances from other EAC countries (69 per cent). At the other end of the scale, only 13 per cent of remittances sent to Kenya originate from the EAC.

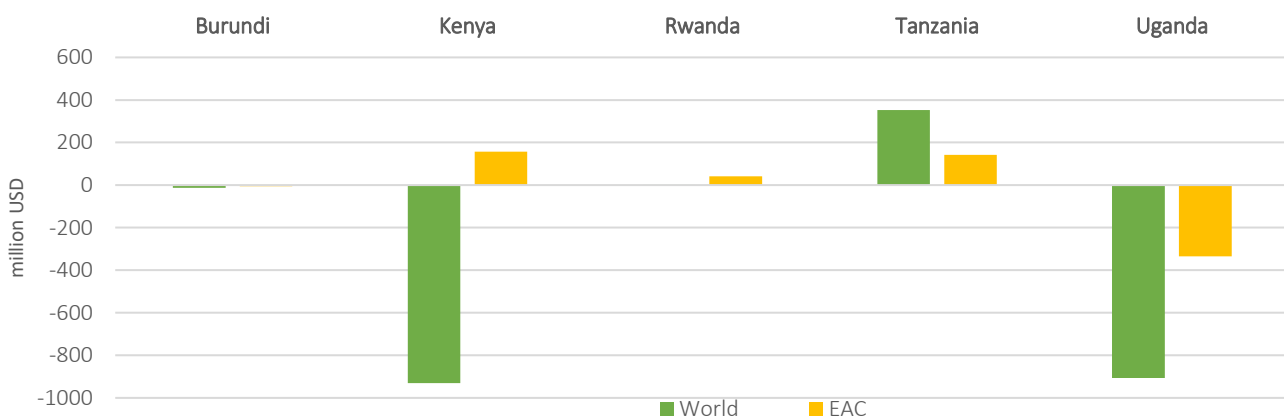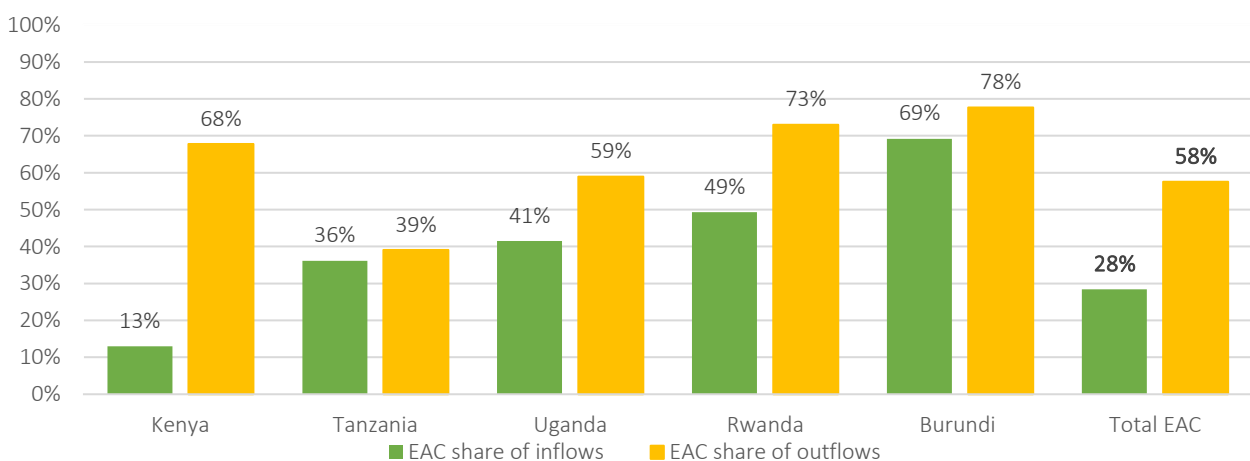Figure 10 - Remittance balance in the EAC countries (2010-2015)

Figure 11 - EAC share of remittance inflows and outflows (2010 - 2015)

Source: World Bank - Bilateral Remittance Matrix (2015)

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[8] Figures have been computed on the average volumes between 2010 and 2015 to avoid misguidance from possible yearly volatility.

In regards to remittance outflows, 58 per cent are intra-zone transfers. Burundi is the first country in terms of share of outflows toward EAC countries as a proportion of total outflows (78 per cent). While most of Kenyan inflows are received from outside the EAC, 68 per cent of the total volume of outflows are sent to one of the four other member countries. Table 8 provides an overview of bilateral remittance flows between EAC member countries in 2014. In volumes, the strongest linkages stem from remittances from Rwanda to Uganda (185 million USD in 2014) and from Tanzania to Kenya (83.7 million USD).

The data does not reveal **any pattern in intra-EAC share of remittance inflows and outflows**. While some countries are close to a balance between EAC share in the total of inflows or outflows (Tanzania or Burundi), there are larger gaps in other countries between money sent to and received from EAC countries (Kenya, Rwanda or Uganda) (Figure 10). Several assumptions can be made to account for such disparities. The structure of remittance inflows and outflows can result from labour migration flows and characteristics. Both the volume of people working abroad and the type of occupation that foreign workers can have in the different destination countries matter to understand how remittance flows relate to labour migration dynamics.

In the context of the EAC, it is difficult to retrace the type of migration from which remittance flows originate, as remittances are often transferred through informal channels. It is therefore not possible to determine labour migrant remittances. In addition, there is very limited information on refugees' remittances (Vargas-Silva, 2016). It is also worth investigating to what extent these disparities result from national contexts and recent histories, particularly conflict situations.

Table 8 - Bilateral remittances in 2014 (in million USD)

COUNTRY OF ORIGIN	COUNTRY OF DESTINATION					REMITTANCES TO EAC AS % OF TOTAL
	BURUNDI	KENYA	RWANDA	TANZANIA	UGANDA	
BURUNDI		1.73	18.07	26.91	1.38	78.35
KENYA	0.27		1.28	36.91	59.45	30.47
RWANDA	6.48	2.72		49.12	185.32	93.91
TANZANIA	26.83	111.77	8.81		35.21	31.61
UGANDA	1.99	83.70	22.94	27.17		77.94
REMITTANCES FROM EAC AS % OF TOTAL	73.12	12.81	39.87	35.97	26.17	

Source: World Bank, 2015

Implications of remittance flows

Remittance volumes and flows are a key dimension when studying the implications of labour migration. Indeed, remittances can have significant economic impacts on both the host and the origin country. According to Taylor (1999), remittances participate in the strengthening of "*income growth linkages*". Improving the emergence of "*fertile grounds for remittances*" is a relevant channel to reducing poverty.

At a macroeconomic level, **remittances can affect growth through different channels** (Singh, Haacker, Lee, & Le Goff, 2011). These flows can be repayment of a loan obtained by migrants to finance their journey (Poirine, 1997). They can also be motivated by altruism to provide support to family members who stay in the origin country (Elbadawi, de Rezende Rocha, & Mundial, 1992). While these different types of motivation are difficult to measure, several studies argue that remittances participate in **absorbing negative economic shocks** and may have a counter-cyclical role. Using data on 36 Sub-Saharan African countries between 1990 and 2008, Singh et al. (2011) also conclude on the economic stabilising role of remittance flows and their key role in absorbing shocks in origin countries. These shocks are not only economic: Freund and Spatafora (2005) exhibit an overall increase in remittance inflows when there is a situation of conflict in the recipient country.

Remittance flows also relate to economic and institutional contexts and are intertwined with potential inclusive growth paths. As argued by Chami et al (2009), **remittances can contribute to reducing economic volatility**. They can also boost investment in countries where financial development and access to credit are limited: Fajnzylber and Lopez (2007) shed light on the substitutability of remittances and financial development, giving credit to the assumption of pro-inclusive growth impacts of remittances. This perspective on the macroeconomic impact of remittance flows on economic growth can be tested at the micro-level by accessing the consequences of receiving remittances from abroad on households' standards of living.

In Burundi, Fransen (2015b) investigated the economic and social effects of remittances. Based on survey data, she analysed the importance and effects of remittances for households in Bujumbura. The findings indicated that wealthier and higher-educated households are more likely to receive remittances. This can be explained by the positive selection of this type of household into migration to countries outside of Africa. In terms of the use of remittances, it was found that this income is largely used for non-productive assets. Productive assets, including asset ownership and education, were, however, not affected by remittances (Fransen & Mazzucato, 2014).

Turning to the social effects of remittances in Bujumbura, Fransen (2015a) investigates the impact of remittances on the social capital of remittance-receiving households. This investigation is based on the argument that **social capital is a precondition for reconstruction and development**. A distinction was made between bonding and bridging social capital investments in order to explore how far remittance-receiving households invest in social capital to benefit their in-groups as opposed to social capital investments that cross social divides. The results show that remittances incentivised households to invest in structural social capital by donating time but not money. Remittance-receiving households participated more in organisations and invested more in their bonding social capital than non-remittance-receiving households in cases where the network comprised family members. These households were more likely to give money to family members in rural areas. At the same time, they spent less on wider networks of family and friends than did similar non-remittance-receiving households (Fransen, 2015a). This may be due to a crowding-out effect of remittances, where receiving remittances leads to financial independence and reduces incentives to invest in social capital.

Rubyutsa (2012) investigates the role of remittances from the diaspora to the development of Rwanda. He finds that for the period 2006 to 2009, remittances were an important source of income for the country and had a positive impact on consumption and production. Remittances were sent through both formal and informal channels to family and friends. Informal channels are used to avoid transaction costs and taxation of remittances. The uses of remittances in Rwanda are varied and include health care, education, building houses, poverty reduction and productive investments (Rubyutsa, 2012). Caarls et al. (2013) more specifically consider the role of migrants in the reconstruction of Rwanda. They provide an analysis of the importance of migratory contacts and how remittances can be used for mobilizing this social capital. The findings show that migratory contacts do influence reconstructive behaviour and reconciliatory attitudes, whereas financial remittances lead to a reduction of participation in such activities (Caarls et al., 2013).

Conclusion 4: Need for primary data collection to address KG4

The **quality and suitability of the literature on remittances is high** and allows one to map the main bilateral remittance patterns in the EAC. In volume, Kenya receives the most remittances, followed by Uganda. Burundi and Rwanda are receiving the largest inflows as a share of GDP. Since remittances are often sent through informal channels, it is, however, difficult to assess the links between migrants economic inclusion and remittance flows.

While the patterns of remittance flows are heterogeneous in the region, inflows and outflows have been stable in the previous decade. This stability is in line with insights from the literature that stress the counter-cyclical role of remittances and the positive impact on stabilisation of livelihoods.

As detailed above, yearly data on remittance flows are available and provides material to describe the main remittance patterns in the EAC. Building on the different datasets, one can **distinguish between flows that occur within the EAC and**

those that relate to the rest of the world. This enables the research team to outline country profiles and comparisons between EAC country members. These data do not allow for a differentiation between different types of remittance. They do not provide any information regarding the **profiles of migrants who are sending remittances** – regular vs. irregular migrants, time spent in the host country, individual characteristics – nor on the characteristics of those receiving money from abroad.

To put it differently, **existing data allows measuring remittance flows at a macroeconomic level, while microeconomic features of remittance dynamics remain unclear**.

Primary data collection will aim to address this information gap. It will document the profiles of migrants who are sending and receiving remittances. The rapid survey will identify individuals who send or receive remittances, with a thorough mapping exercise to be conducted based on this data. In a broader perspective, primary data collection will bridge the gap between labour migration patterns and remittance flows in the EAC thanks to the rapid and detailed surveys. This detailed survey will target specific migrant groups to be compared with existing remittance data. The existing data give the researchers a consistent frame to anchor data collection. Indeed, it is difficult to measure precisely the amount of money exchanged through individual surveys. By cross-referencing the two data sources, the research team will be able to include a typology of remittances to the macroeconomic data and to map remittance flows more comprehensively.

Conclusion

Main findings of the literature review

This literature review provides insights on labour migration in the EAC, articulated around key findings:

1. While the Common Market Protocol of the EAC allows for free movement of workers across the region, the large size of the informal sector – accounting for 70 to 80 per cent of employment – limits the role of existing formal labour legislation in regulating overall labour migration flows.

2. There are a large variety of migration drivers and dynamics in the five EAC countries. Kenya is characterised by higher ties with countries outside the EAC and attracts migrants due to its strategic location as a regional hub. Tanzania, and more recently Uganda, are welcoming a larger share of refugees coming from within the region. Burundi and Rwanda appear to be less attractive in terms of labour and have positive migration balances, with a higher emigrant stock.

3. The categories of work open to the EAC's workers stipulated in the CMP are mostly high-skilled professions where countries are more likely to face skill shortages. While migration of qualified workers can have positive spillover effects on both origin and destination countries – through remittances, economic homogenisation between the countries and harmonisation of skills – a large majority of potential employment seekers are being excluded. This has two main implications: it hinders measurement of irregular labour migration, necessary to design relevant policies, and is likely to foster vulnerabilities of irregular migrants and refugees who engage in informal activities.

4. Refugees face structural impediments to accessing formal labour markets and employment in the EAC, except in Uganda. Yet, refugees represent a significant share of the overall stock of migrants – 50 per cent in Kenya, above 25 per cent in Uganda and Tanzania. Refugees often engage in informal economic activities that significantly affect the functioning of the local labour markets.

5. Female migrants, who represent half of overall migration flows, face discrimination in the labour markets. They play a specific role in the value chains and remittance chains, and their economic engagement brings a positive impact on securing livelihoods and improving access to education and health.

6. EAC countries have strong linkages in intra-regional remittance flows. Burundi and Rwanda receive the largest inflows in terms of GDP share (more than 2 per cent of GDP) while Tanzania, Uganda and Kenya have a positive balance at the scale of the EAC. Remittances play a shock-absorber role, with the significant flows in the EAC playing a role in stabilising livelihoods and sustaining inclusive growth.

Phase 2: Remaining data gaps and room for further research

While the inception phase of this research provides relevant evidence on the main dynamics that are at stake in the EAC in terms of labour migration, data gaps and the lack of evidence hinder a comprehensive mapping of migration flows in the EAC. The gaps crucial to understanding migrant engagement in the labour markets are:

1. **Migrant profiles.** While migration stocks are well documented and allow mapping migration balances in the EAC countries, data are lacking in granularity with no existing breakdown by migrant profiles. This hinders the analysis of migration drivers and the role played by labour migration among overall flows. In the broader profiling effort, the profiling of skills is key: understanding the link between labour migration and professional skills is of particular interest in terms of regional policies.

2. **Female labour migration.** More data are needed to analyse the engagement of female migrants in the EAC labour markets. Studies in other parts of the world highlight the specific roles women play in the value chains, and these insights are worth testing in the EAC. Documenting the profiles of female migrants who engage in economic activities will have implications on poverty reduction policies.

3. **Irregular migration.** The lack of data on irregular migration in the EAC is a major hindrance in the comprehensive mapping of migration flows in the EAC. Irregular migrants are likely to engage in informal economic activities and are more exposed to smuggling and human trafficking. The development of measurement tools will enable decision makers to develop legal and protection frameworks to increase the economic impact of irregular migrants and refugees and enhance their protection rights.

4. **Remittances.** Intra-regional remittance flows are well documented. However, the origin of remittance flows remains unclear: the profile of senders and receivers is worth investigating in order to assess the channels through which remittances can impact poverty reduction and foster inclusive growth paths.

To address these gaps, the research team has developed an ambitious primary data collection plan consisting of qualitative interviews, a rapid survey conducted by SMS and detailed face-to-face surveys in selected migration hubs in the EAC countries.

Conducting face-to-face interviews with migrant populations, which are a particularly "hard-to-reach" target group, raises a number of challenges. The combination of different approaches, based on Key Informant Interviews, Focus Group Discussions and quantitative data collection will aim at mitigating the potential issues associated with fieldwork. Moreover, the research team has conducted a detailed stakeholder mapping in order to ensure that all actors that are related to the research have been clearly identified. Annex L provides details on this exercise and displays the breakdown of stakeholders pertaining to each knowledge gap.

The research team is aware of the challenges and risks associated with fieldwork data collection. In order to maximise the chances of success, the research team constructed a risk matrix for each country under review, identified the main challenges that can occur during fieldwork and developed mitigation strategies to circumvent potential hindrances. Annex M presents this risk assessment into details.

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