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LIVELIHOODS POLICY BRIEF NO.1

LABOUR MARKETS IN NINEWA, OCTOBER 2021



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LABOUR MARKETS IN NINEWA POLICY BRIEF

This Policy Brief provides an overview of labour market conditions in Ninewa Governorate, focussing on the economy, employment and migration. The report identifies the types of support that job seekers require to gain employment; identifies the types of jobs currently available in the labour market and the skills that are missing; and provides a set of policy recommendations to strengthen labour markets in Ninewa.

EMPLOYMENT PREFERENCES

82% of jobs seekers prefer to open their own business

85% of men surveyed vs **72%** of women surveyed

BUT 96% REPORT LACK OF ACCESS TO FINANCE

SECTOR ANALYSIS



TO ACCESS JOBS...

49% of surveyed job seekers believe that **EXPERIENCE** matters most vs **51%** of surveyed job seekers believe that **NETWORK** matters most

SKILLS ASSESSMENT

1/3 of surveyed job seekers believe knowledge to be an important factor for employment

1/4 express interest in training

The skill gap is minimal according to job seekers and employers

WORKER'S WAGES

Minimum wage in Iraq is **USD 239**

Skilled workers monthly wages range between **USD <100-600**

Only **12%** of surveyed employers pay above minimum wage

HIGHEST SALARIES

Food Prep USD 327

Wood Working USD 284

Metal Working USD 269

CONTEXT OVERVIEW

Throughout history, a diverse mix of ethnicities and religions have existed in Ninewa. In addition to a sizeable Sunni Arab population, the governorate is home to Shia Arabs, Kurds, Assyrians, Chaldeans, Turkmen, Yazidis, Shabak and other minorities.

Over the past decades, policies of Arabization and Kurdicization, as well as the targeting of certain minorities, have aggravated regional tensions.¹ In August 2014, the Islamic State of Iraq and the Levant (ISIL) conquered large areas of Ninewa before being driven out in 2017, with fierce battles fought in West Mosul in particular. ISIL's occupation and the subsequent war resulted in vast displacement, land contamination and infrastructure and business destruction.

According to the latest data from the IOM Displacement Tracking Matrix, displacement remains high in Ninewa, with over 44,000 displaced households (or almost 257,000 individuals) recorded. More than 5,500 individuals were secondarily displaced there as of the second half of 2020.² The highest number of internally displaced persons (IDPs) in the governorate are located in Mosul, Shikhan and Sinjar. In addition to IDPs, there are over 320,000 returnee households (or 1,920,360 individuals) present in the Ninewa. The highest number of returns were recorded in Mosul, Tel Afar and Hamdaniya.

Table 1: Displaced people and returnees in Ninewa, IOM, Round 122, July 2021

DISTRICT	NUMBER OF IDP HOUSEHOLDS	NUMBER OF IDP INDIVIDUALS	NUMBER OF RETURNEE HOUSEHOLDS	NUMBER OF RETURNEE INDIVIDUALS
Akre	4.767	28.431	–	–
Ba'aj	1.231	7.386	9.036	54.216
Hamdaniya	3.276	16.414	28.317	169.902
Shikhan	7.920	42.850	357	2.142
Hatra	722	4.332	8.104	48.624
Mosul	17.479	103.642	177.210	1.063.260
Sinjar	6.094	36.564	19.905	119.430
Tel Afar	1.571	9.426	59.986	359.916
Tilkaif	1.424	8.544	17.145	102.870

1 NCCI, Ninewa Profile, 2010. Available from: www.ncciraq.org/images/infobygov/NCCI_Ninewa_Governorate_Profile.pdf.

2 IOM, DTM Report, 2020.

Ninewa is one of the poorest governorates in Iraq. In 2014 (pre-ISIL occupation), its poverty rates averaged 34 per cent and showed great variety among different sub-districts – between 15 per cent to 50 per cent – with the highest share of poor residing in Mosul City.³ According to local media outlets, poverty rates in Ninewa have increased since 2014, reaching 37.7%, while falling elsewhere in Iraq.⁴

IOM's [Return Index](#) includes a composite score assessing of the scale of severity for access to livelihoods and basic services in areas affected by conflict and displacement. Conditions are most severe in Ba'aj and least severe in Hamdaniya.⁵ As a whole, Ninewa averages 1.93, a medium score that ranks slightly higher compared to the average of all the locations assessed (1.72).

Table 2: Scale of severity based on a composite score from the IOM Integrated Location Assessment Data from 2021

DISTRICTS	SCALE OF SEVERITY (1 LOW 3 HIGH)
Ba'aj	2,70
Hatra	2,67
Sinjar	2,43
Tilkaif	1,93
Tel Afar	1,75
Mosul	1,60
Shikhan	1,25
Hamdaniya	1,14
Ninewa	1,93
Average All Locations	1,72

A recent assessment found that among minorities in Ninewa, unemployment – rather than insecurity – is considered a top

concern.⁶ Despite this, there is a lack of recent estimates concerning employment rates, unemployment rates and economic activity at the regional level in Iraq. Unemployment in Ninewa was recorded at 7 per cent in 2011 – 16 per cent among men and 6 per cent among women.⁷ However, these figures are likely to be much higher now.

Unemployment is higher outside of Mosul. For example, in Tel Afar Centre, a 2018 assessment found that only one third of adult household members reported earning income from employment in the 30 days preceding the assessment, working an average of 17 out of the last 30 days.⁸ Employment among women was particularly low, with only 8 per cent reportedly earning an income, compared to 57 per cent of men.⁹ It is estimated that as much as 45 per cent of people in Sinjar are unemployed, with female unemployment recorded at 30 per cent.¹⁰

Ninewa's economy remains largely agriculture based. According to a recent assessment, before 2014, farms employed an average of 14 workers, a measurement corroborated by a recent study conducted by IOM in Sinjar that estimated 10 to 15 people to be employed per farm, or about three families in total.¹¹ However, farmers' incomes have now been reduced by almost 50 per cent, with a lack of government assistance cited as one of the most important factors in this downturn.¹²

In Sinjar, nearly 80 per cent of the working population was involved in agriculture before 2014. Today, many people continue to work in agriculture but with a reduced capacity, especially due to loss of machinery, such as harvesters and tractors. Out of the 80 per cent that worked in agriculture prior to 2014, it is estimated that only 10 per cent might be able to resume their original agricultural activities in Sinjar.¹³

The agricultural sector in Ninewa faces a variety of challenges, including lack of government support in the form of loans and agricultural inputs; lack of compensation for war-affected farmers; usage of dated agricultural techniques; an overall dependency on rainfall (estimated at 90%); and travel restrictions.¹⁴

3 Tara Vishwanath, Dhiraj Sharma, Nandini Krishnan, and Brian Blankespoor, Where are Iraq's Poor: Mapping Poverty in Iraq, 2014. Available from: <https://openknowledge.worldbank.org/bitstream/handle/10986/22351/Where0are0Iraq0ping0poverty0in0Iraq.pdf?sequence=1>.

4 Kirkuk Now, Poverty rate in Nineveh province nearly doubled, 2 February 2020. Available from: <https://kirkuknow.com/en/news/61545>.

5 IOM, Return Index, Round 12, April 2021.

6 UNDP, Human Development Report, 2014.

7 Ashish Kumar Sen, Unemployment Replaces ISIS as Top Security Concern for Minorities in Iraq, <https://www.usip.org/publications/2021/06/unemployment-replaces-isis-top-security-concern-minorities-iraq>.

8 REACH, Tel Afar: Area Based Assessment, September 2018. Available from: https://reliefweb.int/sites/reliefweb.int/files/resources/reach_iraq_report_aba_telafar_september_2018.pdf.

9 Ibid.

10 IOM, Ninewa Value Chain Analysis, 2021.

11 IOM, Destroyed Businesses in Sinjar, 2020, report in preparation.

12 IOM, in Search of Economic Opportunities for Agribusiness in Iraq: Ninewa Value Chain Analysis, 2021, report under publication. Ibid.

13 Ibid.

14 Ibid.

METHODOLOGY

This analysis is based on data collected in Ninewa during early 2021 for IOM Labour Market Assessments¹⁵ (LMAs), which inform IOM's individual livelihood assistance (ILA) and market assessments,¹⁶ which in turn inform the Enterprise Development Fund (EDF).

In Ninewa, IOM conducted 273 jobseeker and "under-employed individual" surveys (70 women, 203 men), 276 employer surveys (12 women, 264 men) and 79 key informant interviews (6 women, 73 men). These were carried out in the Mosul, Tel Afar, Ba'aj, Shikhan and Sinjar districts of Ninewa. The majority of respondents were returnees. A desk review and analysis of IOM and DTM data provided additional context.

PREFERENCES AND TRAINING NEEDS AMONG JOBSEEKERS

IOM assessments indicate that **82 per cent of jobseekers would prefer to open their own business**; 12 per cent find working for others or opening their own business to both be acceptable; and only 5 per cent would exclusively prefer to work for others. Despite preferring to open their own businesses, women are slightly less inclined to this compared to men (reported by 71% of women against 85% of men).

When asked what was keeping them from opening their own businesses or accessing the jobs they desire, jobseekers mentioned a lack of: financing (96%); jobs (33%); connections (18%); resources such as raw materials (16%); experience (8%); and training/skills (8%). A small number of jobseekers (5), all women, mentioned community acceptance and lack of childcare options as preventing them from working or opening their own businesses. The preference for entrepreneurship could therefore be partially attributed to the limited availability of jobs – likely even more pronounced in less urbanized areas – as well as to the unappealing types of jobs and poor working conditions common in the private sector across Iraq.

Key informants reported agriculture and livestock, manufacturing, food processing and services as having potential for further growth in Ninewa, suggesting that these are sectors where investments in micro-businesses might therefore be appropriate, especially considering the preference for

self-employment among jobseekers. Key informants also pointed to less relevant sectors – mostly trade and retail, especially grocery stores and agriculture – which appear oversaturated. Despite some inconsistencies in the responses, about a third also mentioned that no sector was oversaturated in Ninewa, pointing to all sectors as having potential for further expansion.

The leading factor in finding satisfactory employment is having connections (mentioned by 61% of jobseekers) followed by experience (49%). Knowledge and availability of jobs were mentioned by 34 and 38 per cent of jobseekers, respectively.

Table 3: Factors influencing one's ability to land a job

EMPLOYMENT FACTORS	NUMBER OF JOBSEEKERS	%
Connections	167	61%
Experience	134	49%
Availability of jobs	103	38%
Knowledge	92	34%

The lesser importance given to knowledge is confirmed by the relatively low number of respondents (26%) who felt they required any sort of **training**; half of all female respondents and 18% of male respondents thought they required some degree of training. In line with predominant gender roles and likely the ability to perform the work from home, female jobseekers mostly mentioned requiring training in sewing, tailoring, hairdressing and food preparation, while men mentioned barbering, blacksmithing, computer skills, English language, mechanic skills and carpentry. Overall, many respondents mentioned a desire to receive different training, pointing to a great degree of adaptability to the current circumstances, in which poor employment prospects leave

little room for job aspirations. Respondents further noted that ensuring an income was the most importance factor in their decisions about what types of training to receive.

Table 4: Training required as mentioned by male and female jobseekers

TYPE OF TRAINING	NUMBER OF WOMEN
Sewing	17
Hairdressing	7
Food preparations – sweets	6
English language	3
Any training	2
Computer skills	2
Driving	1
Health-related	1
Restaurant management	1
Painting	1
Farming	1
Accounting	1
Business management	1
TYPE OF TRAINING	NUMBER OF MEN
Barbering	9
Blacksmithing	5
Computer skills	5
English	5
Mechanic	4
Carpentry	4
Any training	4
Accounting	3
Plumbing	3
Business management	3
Construction (secondary ceilings)	3
Mobile repair	1
Food preparation	1

TYPES OF JOBS AVAILABLE, WORKFORCE, AND SALARIES

Jobseekers surveyed in 2021 were mostly pessimistic about which **sectors hiring the most** in Ninewa, with almost a third stating that none were currently recruiting. Others provided examples, including recent hiring in construction (which mostly consists of daily-waged jobs), mentioned by 21 per cent of jobseekers; and trade in different goods and retail (mostly groceries), each respectively mentioned by 12 per cent of jobseekers. In addition, hospitality and restaurants in particular were mentioned (11%), followed by hires in manufacturing (8%), agriculture (6.2%) and less-mentioned examples, such as services (mostly hairdressing and barbering), blacksmithing, carpentry and food preparation, especially bakeries.

Table 5: Sectors currently hiring according to jobseekers

TYPE OF JOB	NUMBER OF MENTIONS	%
None	81	30%
Construction	58	21%
Retail – groceries	34	12%
Trade/retail (electrical devices, mobile phones, household items, etc.)	32	12%
Restaurants	29	11%
Manufacturing	23	8%
Agriculture	17	6.2%
Services (barber, hairdressing, personal care, repair)	15	5.4%
Blacksmithing	10	3.6%
Carpentry	10	3.6%
Bakeries	8	2.9%

Jobseekers did not have strong preferences for employment in certain sectors. Instead, it was the availability of work in a sector that made jobseekers want to work in it. Most jobseekers thought that the jobs currently being hired for were desirable due to 'higher demand' in the sector in question. In addition, 28 per cent of jobseekers were explicit about the lack of decent salaries in the sectors currently hiring, with others mostly expressing mixed views.

¹⁵ <https://iraq.iom.int/publications/labour-market-opportunities-and-challenges>

¹⁶ <http://edf.iom.int/#Publications>

Key informants mainly confirmed the answers provided by jobseekers and mentioned that the sectors currently hiring include construction (37%), trade/retail (especially groceries, mentioned by 28%) and agriculture (25%). 24 per cent indicated an absence of sectors currently hiring, which was corroborated by jobseekers, who mostly thought that no sector was currently hiring, as stated above. Less mentioned examples of hiring sectors included manufacturing (especially plastic), restaurants, services in general and micro-businesses (especially mobile).

Table 6: Sector currently hiring in Ninewa according to Key Informants

SECTORS HIRING	NUMBER OF MENTIONS	%
Construction	29	37%
Trade/retail – groceries, sheep, agricultural inputs	22	28%
Agriculture – in general, wheat, barley, poultry, livestock	20	25%
None	19	24%
Manufacturing	10	13%
Restaurants	10	13%
Services – photography	10	13%
Micro-business	9	11%
Carpentry	5	6.3%
Food	4	5%
Automotive	2	2.5%
Health	2	2.5%
Blacksmithing	1	1.3%
Chemical	1	1.3%

While on the rise, **women's involvement in the economy** remains limited. When involved, women tend to work in personal care, tailoring/sewing, retail (especially cosmetics and apparel), food preparation, agriculture and livestock – and often work from home. According to key informants, women's businesses are mostly profitable.

The picture of youth employment in Ninewa is less clear and points to the need for additional data collection. Only about a fifth of employers (21%) reported not employing any youths (or only employing individuals 25 years old and above), with the majority mentioning employing younger individuals – categorized as youth per UN definition. This points to the presence of youth in the workforce. As employers provided only age ranges, it is difficult to ascertain the actual prevalence of youth among the surveyed enterprises. A small number also noted employees under 15 years of age, suggesting the likely presence of child labour.

Average salaries were difficult to calculate since some employers reported not paying workers because they were family members. Daily wages were often reported instead of monthly wages, further underscoring the precariousness of jobs. Nonetheless, among employers who reported having skilled workers (59%), monthly wages ranged from under USD 100 to USD 600 with an average of USD 215.¹⁷ The highest salaries were found in the food preparation, carpentry and metal sectors. Retail and the textile industry paid among the lowest salaries on average. About 40 per cent of employers (who also reported having skilled employees) also paid salaries below the current minimum wage, with the remaining paying above.

Table 7: Average salary paid to skilled workers divided per sector

SECTORS	AVERAGE SALARY SKILLED WORKERS
Food preparation	327
Carpentry	284
Metal	269
Manufacturing	237
Construction	209
Trade	207
Automotive	200
Services	191
Food processing	178
Retail	149
Textile	131
Average	215

36 per cent of businesses reported having unskilled workers with salaries ranging from under USD 100 to USD 600, with the average calculated at USD 192. Only 12 employers (12%) – mostly in the construction and food preparation sectors, followed by carpentry, retail and metal – reported paying above the minimum wage.

Unsurprisingly, in line with job saturation and low salaries, overall self-reported demand among the surveyed enterprises is poor in Ninewa, with only 8 per cent mentioning having high demand, mostly in the trade/retail (8 businesses in total) and food preparation (6) sectors, followed by metal (3). One third reported having average demand, and the rest, poor or very poor demand for their products or services. An attractiveness matrix can be also applied to measure

and contrast the varying levels of demand as reported by local businesses and to compare these levels to the salaries reportedly paid to skilled workers in these businesses. This exercise allows for a better understanding of what types of jobs could be sustainable and decently remunerated. Only six businesses were found with both high demand and above-average salaries – four in food preparation and two in the metal sector. Among those with average demand and above-average salaries, food preparation and metal scored high again, alongside retail and construction and less among services. Nonetheless, the same sectors were represented among employers reporting poorer demand and/or paying lower salaries, too.

Table 8: Demand and salaries paid to skilled workers as reported by employers

		POOR DEMAND	AVERAGE DEMAND	HIGH DEMAND
POTENTIAL FOR IMPACT ↑	Higher Salaries (above average)	Automotive (2) Carpentry (4) Construction (2) Food preparation (6) Manufacturing (6) Metal (5)	Construction (4) – retailing ceramics, construction work in general Food preparation (5) – bakeries, sweets Metal (5) – aluminium, blacksmithing Retail (5) – groceries and 1 paint retailer Services (2) – copy and personal care	Food preparation (4) – bakeries Metal (2) – blacksmith, aluminium
	Lower Salaries (below average)	Automotive (2) Carpentry (4) Construction (10) Food preparation (4) Food processing (1) Manufacturing (4) Metal (2) Retail (22) Services (1) Textile (1)	Automotive (3) Carpentry (1) Construction (3) Food preparation (5) Food processing (2) Hospitality (1) IT (1) Manufacturing (2) Retail (13) Services (3) Textile (4)	Food preparation (1) Metal (1) Retail (3) Services (1) Trade (3)
		POTENTIAL FOR GROWTH →		

¹⁷ Exchange rate on 12 October 2021, www.xe.com.

MISSING SKILLS

General pessimism toward the job market was also corroborated by the **near absence of challenges in finding skilled workers**. Less than 10 per cent of jobseekers (or 26 in total) thought there were sectors experiencing difficulties in finding skilled individuals. According to jobseekers, missing skills include service provision, such as laundry and dry-cleaning services; photography; barbering; and accounting, followed by blacksmithing; maintenance of phones and laptops; construction work, including electrical wiring; customer care; carpentry; mechanic services; and agriculture- and manufacturing-related skills. Four respondents were explicit about the need for experience rather than actual skills.

Table 9: Missing skills reported by jobseekers

MISSING SKILLS	NUMBER OF MENTIONS BY JOBSEEKERS
Services – laundry, photography, accounting, barber, gym trainer, IT/technology	13
Blacksmithing	9
Maintenance – phones and laptops	5
Construction – in general, electrical wiring	4
Trade/retail customers care	4
Carpentry	3
Mechanic and car spare parts retail	3
Agriculture	2
Manufacturing	2
Dying	1
Tailoring	1
Health-related	1

A higher percentage of employers – but still only 15 per cent – reported having difficulties finding skilled and experienced workers in their respective sectors. Overall, the skills missing include mechanic servicing for a variety of vehicles; blacksmithing and working with aluminium; different skills in construction; food preparation; tailoring; carpentry; customer care; and accounting, followed by less mentioned examples. The lack of experience in general and a lack of soft skills in particular were among the most mentioned, too. Some employers lamented that, once skilled, some workers tend to open their own businesses.

Table 10: Skills difficult to find according to employers

TYPE OF SKILLS	NUMBER OF MENTIONS
Automotive – mechanic for vehicles, agricultural machinery, and bicycles	5
Metal – blacksmithing, aluminium	5
Experience in general	5
Soft skills/behavioural traits – integrity, commitment, accuracy, etc.	4
Construction – cementing, building, marble moulds, driving construction-related vehicles	4
Food – cooking, baking, sweets, butchery	4
Tailoring – traditional clothes	3
Carpentry – armchairs, sofas, operating bandsaws	3
Customer care	2
Accounting	2
PVC	1
Agriculture – poultry	1
Barbering	1
Repair – generators	1

CONCLUSIONS AND RECOMMENDATIONS

This policy brief paints a bleak economic picture of Ninewa, with employers reporting mainly poor demand and generally poor employment prospects. In addition, interest in education and training is less valued, especially in light of perceptions that connections rather than education determine access to jobs.

Economic recovery from the ISIL crisis remains limited as gains recede due to the impact of COVID-19 prevention measures and the depreciation of the Iraqi Dinar. This is all taking place in the context of continuing high return and displacement rates, which create more challenges in the governorate.

A set of recommendations for livelihoods practitioners working in Ninewa are outlined below to better tailor the support to the governorate's job markets:



As a result of the preference among jobseekers to open their own businesses combined with the lack of access to finance, financial and business support is recommended for both male and female micro-entrepreneurs in Ninewa.



Considering the importance and centrality of agriculture in the governorate, farming-related training and support to male and female farmers (and other actors involved in the agricultural value chains) remain central in Ninewa.



Key sectors offering opportunities for expansion are agriculture and livestock, manufacturing, food preparation/processing and service; fewer opportunities for expansion exist in the trade and retail sectors, especially in groceries.



While education and training are overall less valued, some varieties still appear to be sought after by jobseekers and needed by employers, including soft skills. For women, tailoring, personal care, food preparation, languages and basic computer skills are recommended. For men, skills in mechanic services for different types of vehicles and machinery; maintenance of phones, generators and other machinery; blacksmithing; basic computer operation; English language; carpentry (furniture); plumbing; barbering; construction (including secondary ceilings, electrical wiring, cement mixing, etc.); customer care; and food preparation are recommended.



As the need for experienced workers was stressed, apprenticeship and placements remain key in supporting jobseekers in Ninewa, along with on-the-job training.



In more urbanized areas, skills in a variety of services and information technologies are also recommended, including for women.



Infrastructure destruction and a general lack of income and savings are particularly acute in Ninewa. To alleviate the consequences of high unemployment rates, cash-for-work activities are recommended.



Employment opportunities are heavily weighted towards those with networks and connections, to which returnees, women, youth and other marginalized groups often lack access. Assistance to establish local-level formal and informal networks between these groups and employers will support more even access to employment.



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