

Pathways to Gender-Inclusive Economic Development in Sub-Saharan Africa: A Sectoral Analysis

Ethiopia Report



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Reading note: The general and sectoral barriers to and drivers of WEE opportunities reported on in the Pathways Study are more similar than different. For the purpose of sectoral-level stakeholders, this report provides a full discussion of these barriers and drivers per sector. While this inevitably results in some repetition across the report, the intention is for each sectoral brief to stand as an independent piece/extract if necessary.

Pathways to Gender-Inclusive Economic Development in Sub-Saharan Africa: A Sectoral Analysis (Pathways Study) is a collaborative effort among various stakeholders (organisations, individual researchers and gender experts) who joined forces and expertise to achieve a common goal - developing and implementing strategies to strengthen women's economic empowerment in Ethiopia.

These include:

- The Pathways Study Steering Committee (SC) which provided financial and/or technical support for the Pathways project including: (i) International Cooperative Research Group (ICRG), which is the research arm of the United States Overseas Cooperative Development Council (U.S. OCDC); (ii) United States Agency for International Development (USAID); (iii) Mastercard Foundation; (iv) International Development Research Centre (IDRC); (v) United Nations Entity for Gender Equality and the Empowerment of Women (UN Women); (vi) the African Trade Policy Centre (ATPC), which is a specialised unit within the United Nations Economic Commission for Africa (UN ECA); and (vii) Euromonitor International Ltd. SC partners also provided directional advice guidance in the making of key decisions, supported by making referrals and connections with key country stakeholders and reviewed draft reports.
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- Includovate Ethiopia, a research incubator and social enterprise that designs solutions for inequality and exclusion was the country partner that supported the Pathways Study with secondary research, interviews and initial report writing.
- Country Working Group members including: Amsale Mengistu (Bill & Melinda Gates Foundation), Gedisaam Selam (Etland), Tinebeb Berhane (Action Aid), Misrach Mekonnen & Mihretu Nigussie (CARE International), Joyce Muchena (Mastercard Foundation), Selamawit Firdissa (Ethiopian Agricultural Transformation Agency - EATA) and Includovate Ethiopia team (Dr Kristie Druczka, Sabrina Salam, Elisabeth Belay, Wubalem Hagos and Rebecca Girma).
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We are keen for the findings of the Pathways Study to guide research, policy development and implementation, programming (planning and execution) and advocacy efforts - creating unified voice, clear(er) direction and sustainable action for improved women's economic empowerment in Ethiopia.

Pathways Study Steering Committee

Acknowledgments	3	4. Barriers and enablers to women's economic empowerment in Ethiopia	54
Table of contents	4	4.1 Structural factors	55
List of acronyms and abbreviations	6	4.1.1 Legal and policy commitments	55
Table of key definitions	8	4.1.2 Policy environment	56
Executive summary	12	4.2 Normative factors	59
Key findings	15	4.2.1 Norms around paid and unpaid labour	59
Structural factors	15	4.2.2 Voice, representation and leadership in decision making	61
Normative factors	16	4.2.3 Women's freedom of mobility	63
Individual factors	17	4.2.4 Violence against women and girls	63
Implications and recommendations	19	4.3 Individual factors	64
Policy and advocacy recommendations	20	4.3.1 Human capital	65
Programming recommendations	21	4.3.2 Social capital	66
Research, monitoring and evaluation recommendations	24	4.3.3 Economic capital	68
1. Introduction	26	5. Sector briefs	72
Background and objectives	26	5.1 The coffee sector	73
Methodology summary	28	Sector overview	73
2. Conceptual framework for understanding women's economic empowerment	30	Women's roles in the coffee sector	76
Structural factors	32	Summary of barriers to and opportunities for women's economic empowerment in the coffee sector	79
Normative factors	32	Structural factors	80
Individual factors	33	Normative factors	80
3. Country context	36	Individual factors	82
3.1 Demographics and geography	36	Recommendations	85
3.2 Human development	42	5.2 The livestock sector	88
3.3 Status of the economy, labour force participation and employment	46	Sector overview	88
3.4 Structure and functions of government	50	Livestock ownership and proceeds	91
3.5 Selected stakeholders - overview of focus areas	52	Women's roles in the livestock sector	91
		Production/Rearing	91
		Processing	92
		Marketing	92
		Other roles	93
		Summary of barriers to and opportunities for women's economic empowerment in the livestock sector	94

Structural factors	96	6. Implications and recommendations	138
Normative factors	96	6.1 Policy and advocacy recommendations	140
Individual factors	98	6.2 Programming recommendations	142
Recommendations	100	6.3 Research, monitoring and evaluation recommendations	145
5.3 The cut flowers sector	103	Appendices	148
Sector overview	103	Appendix 1 - Explanation of methodology	148
Women's roles in the cut flowers sector	105	Research execution	148
Summary of barriers to and opportunities for women's economic empowerment in the cut flowers sector	106	Scoping study	148
Structural factors	107	Sector selection	150
Normative factors	111	Stakeholder mapping	153
Individual factors	112	Interviews	153
Recommendations	113	Analysis and reporting	154
5.4 The manufacturing sector	115	Appendix 2 - Sector classification	155
Sector overview	115	Appendix 3 - Cross-sectoral summary of barriers and opportunities and entry points	159
Food processing	115	Bibliography	162
Garments and textiles	116	Limitations of Research	185
Cotton farming	116		
Manufacturing and COVID-19	117		
Women's role in the manufacturing sector	118		
Summary of barriers to and opportunities for women's economic empowerment in the manufacturing sector	121		
Structural factors	122		
Normative factors	125		
Individual factors	127		
Recommendations	130		
5.5 The construction sector - spotlight	133		
Summary of barriers to and opportunities for women's economic empowerment in the construction sector	135		
Recommendations	136		

ADFI	Africa Digital Financial Inclusion	EPPPA	Ethiopian Poultry Producers and Processors Association
AFDB	African Development Bank	EWDNA	Ethiopian Women with Disabilities National Association
AGOA	African Growth and Opportunity Act	EWLA	Ethiopian Women Lawyers Association
AGRA	Alliance for a Green Revolution in Africa	FCA	Federal Cooperative Agency
AIDS	Acquired Immune Deficiency Syndrome	FDI	Foreign Direct Investment
ASF	Animal-Sourced Foods	FGM	Female Genital Mutilation
ATPC	African Trade Policy Centre	FLFP	Female Labour Force Participation
AWiB	Association of Women in Business	FLLC	First-Level Land Certification
BCC	Behaviour Change Communication	GBV	Gender-Based Violence
CAWEE	Center for Accelerated Women's Empowerment	GBVH	Gender-Based Violence and Harassment
CBD	Coffee Berry Disease	GDI	Gender Development Index
CEDAW	Convention on the Elimination of All Forms of Discrimination Against Women	GDP	Gross Domestic Product
CRS	Catholic Relief Services	GFA	Global Framework Agreement
CSO	Civil Society Organisation	GII	Gender Inequality Index
CSR	Corporate Social Responsibility	GRB	Gender-Responsive Budgeting
CTC	Coffee Training Center	GTP	Growth and Transformation Plan
DA	Development Agents	GVA	Gross Value Added
DHS	Demographic Health Survey	HDI	Human Development Index
EAFIA	Ethiopian Animal Feed Industry Association	HIV	Human Immunodeficiency Virus
ECTA	Ethiopia Coffee and Tea Authority	HPR	House of People's Representatives
EEU	Ethiopia Electric Utility	HTP	Harmful Traditional Practice
EHPEA	Ethiopian Horticulture Producers and Exporters Association	IBRD	International Bank for Reconstruction and Development
EHRC	Ethiopian Human Rights Commission	ICA	International Cooperative Alliance
EIGE	European Institute for Gender Equality	ICRG	International Cooperative Research Group
ELTPA	Ethiopian Livestock Traders Professional Association	IDMC	Internal Displacement Monitoring Centre
EMDIDI	Ethiopian Meat and Dairy Industry Development	IDP	Internally Displaced Persons
EME	Enjera-Making Enterprises	IDRC	International Development Research Centre
EMI	Euromonitor International	IFC	International Finance Corporation
EMPEA	Ethiopian Meat-Producer-Exporters	IFETLGTU	Industrial Federation of Ethiopian Textile, Leather & Garment Trade Union
EMPIA	Ethiopian Milk Processors Industry Association	IFPRI	International Food Policy Research Institute

ILO	International Labour Organization	SILC	Savings and Internal Lending Community
IMF	International Monetary Fund	SLLC	Second-Level Land Certification
IOM	International Organisation for Migration	SME	Small and Medium-Sized Enterprises
IPV	Intimate Partner Violence	SNNPR	South Nations Nationalities and People's Region
IWCA	International Women's Coffee Alliance	SRGBV	School-Related Gender-Based Violence
JLCP	Joint Land Certification Programme	SRH	Sexual and Reproductive Health
M&E	Monitoring and Evaluation	SRHR	Sexual and Reproductive Health Rights
MDAs	Ministries, Departments and Agencies	SSA	Sub-Saharan Africa
MEDA	Mennonite Economic Development Associates	STEM	Science, Technology, Engineering and Mathematics
MFI	Micro Finance Institution	TPLF	Tigray People's Liberation Front
MOA	Ministry of Agriculture	TPT	Tuberculosis Preventive Treatment
MOF	Ministry of Finance	TVET	Technical and Vocational Education and Training
MOT	Ministry of Trade	UN ECA	United Nations Economic Commission for Africa
MOWCYA	Ministry of Women, Children and Youth	UN WOMEN	United Nations Entity for Gender Equality and the Empowerment of Women
MOWSA	Ministry of Women and Social Affairs	UNDP	United Nations Development Programme
MSME	Micro Small and Medium Enterprises	UNHCR	United Nations High Commissioner for Refugees
NAP	National Adaptation Plan	UNICEF	United Nations Children's Fund
NEWA	Network of Ethiopian Women Associations	USAID	United States Agency for International Development
NFFPFATU	National Federation of Farm Plantation Fishery Agro Industry Trade Union	U.S. OCDC	United States Overseas Cooperative Development Council
NGO	Non-Government Organisation	VAWG	Violence Against Women and Girls
OCFCU	Oromia Coffee Farmers' Cooperative Union	VSLA	Village Savings and Loan Association
OCHA	Office for the Coordination of Humanitarian Affairs	WAO	Women's Affairs Office
OECD	Organisation for Economic Co-operation and Development	WASH	Water, Sanitation and Hygiene
OHCHR	Office of the High Commissioner for Human Rights	WDCS	Women's Development and Change Strategy
PPE	Personal Protective Equipment	WEE	Women's Economic Empowerment
PSNP	Productive Safety Net Programme	WISE	Organisation for Women in Self-Employment
RCT	Randomised Controlled Trial		
RFA	Rain Forest Alliance		
SACCO	Savings and Credit Cooperative Organisation		
SC	Steering Committee		
SGBV	Sexual and Gender-Based Violence		

Key term	Definition
Cooperative	<p>A cooperative is an autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise.</p> <p>Source: International Cooperative Alliance (ICA)</p>
Economic violence	<p>Economic violence is a form of gender-based violence, and can include acts perpetrated by systems and structures, as well as by individuals. It involves behaviours that control a woman's ability to acquire, use and maintain economic resources, thus threatening her economic security and potential for self-sufficiency.</p> <p>Source: Adams et al, 2008</p>
Employment segregation	<p>The unequal distribution of female and male workers across and within job types.</p> <p>Source: World Bank</p>
Financial exclusion	<p>Financial exclusion refers to a process whereby people encounter difficulties accessing and/or using financial services and products in the mainstream market that are appropriate to their needs and enable them to lead a normal social life in the society in which they belong.</p> <p>Source: European Commission, 2008</p>
Gender-based violence (GBV)	<p>Harmful acts directed at an individual or a group of individuals based on their gender. It is rooted in gender inequality, the abuse of power and harmful norms.</p> <p>Source: UN Women</p>
Gender norms	<p>Accepted attributes and characteristics of male and female gendered identity at a particular point in time for a specific society or community. They are the standards and expectations to which gender identity generally conforms, within a range that defines a particular society, culture and community at that point in time. Gender norms are ideas about how men and women should be and act. Internalised early in life, gender norms can establish a life cycle of gender socialisation and stereotyping.</p> <p>Source: UNICEF</p>

Key term	Definition
Gender wage gap	<p>The gender wage gap is defined as the difference between median earnings of men and women relative to median earnings of men.</p> <p>Source: OECD</p>
Productive employment	<p>Productive employment is defined as employment yielding sufficient returns to labour to permit the worker and her/his dependents a level of consumption above the poverty line.</p> <p>Source: ILO</p>
Resilience	<p>The capacity of individuals, communities, institutions and systems to survive, cope and thrive in the face of shocks and stresses.</p> <p>Source: Mastercard Foundation</p>
Sector and Sub-Sector	<p>The Pathways Study uses “sector” to refer to a broad area of economic activity - an umbrella category that has other economic activities within it. A sector could entail any or all of the following economic activities: (i) primary activities (i.e. related to extraction of raw materials); (ii) secondary activities (e.g. manufacturing-related); or (iii) tertiary activities (i.e. related to services). “Sub-sector” is generally used to denote specific economic activities within a broad sector. While this may appear inconsistent, both terms are sometimes used interchangeably as sub-sectors are not purely divisions or components of a sector; sub-sectors can vary enough to be discussed and/or analysed independently, and a sub-sector in one report may be a sector in another. As our sectors and sub-sectors of focus were selected through consultations with local working groups in each country, we opted to stay as true to the language utilised by these working groups as possible. As such, our use of the words “sector” and “sub-sector” and the terminology for each sector depends on the country context. For example, while “agriculture” is a broad economic sector, specific sectors/sub-sectors within it include commodities such as rice, cocoa, or maize, or commodity groups such as horticulture. In other cases, sector names have been adapted to use those referenced by our working groups. In Ghana, for example, we speak of “Textiles”, while in South Africa we speak of “Clothing, textiles, footwear and leather” (CTFL).</p>

Key term	Definition
<p>Social capital (vertical and horizontal)</p>	<p>Social capital refers to the institutions, relationships and norms that shape the quality and quantity of an individual and society’s social interactions. It includes both vertical and horizontal¹ associations between people, and includes behaviour within and among organisations, such as firms.</p> <p>This view recognises that horizontal ties are needed to give communities a sense of identity and common purpose, but also stresses that without “bridging” ties that transcend various social divides (e.g. religion, ethnicity, socioeconomic status), horizontal ties can become a basis for the pursuit of narrow interests, and can actively preclude access to information and material resources that would otherwise be of great assistance to the community (e.g. tips about job vacancies, access to credit).</p> <p>Source: World Bank</p> <p>Cooperatives have a social network that combines both horizontal and vertical social ties. Horizontal ties represent the social relationships and interactions between cooperative members while vertical ties are the social connections between cooperative members and parties such as off-takers, processors/buyers etc.</p> <p>Source: Deng et al (2020)</p>
<p>Unpaid care and domestic work</p>	<p>Refers to care of persons and housework performed within households without pay, and unpaid community work.</p> <p>Source: OECD</p>

¹Vertical social capital refers to interactions with people/organisations of different (higher) socioeconomic standing (i.e. access to resources) while horizontal social capital refers to connections and relations between people/organisations in similar socioeconomic standing and with access to similar resources.

Key term	Definition
Violence against women and girls (VAWG)	<p>Violence against women and girls is any act of gender-based violence that results in, or is likely to result in, physical, sexual or mental harm or suffering to women and girls, including threats of such acts, coercion or arbitrary deprivation of liberty, whether occurring in public or in private life. Violence against women and girls encompasses, but is not limited to, physical, sexual and psychological violence occurring in the family or within the general community.</p> <p>Source: UN Women</p>
Women's economic empowerment (WEE)	<p>Women having the ability to succeed and advance economically, and the power to make and act on economic decisions to enhance their broader wellbeing and position in society.</p> <p>Source: Calder et al., (2020)</p>

Executive summary

Strengthening women’s economic empowerment (WEE) - including supporting women to equitably participate in, influence and benefit from the economy and society - is a critical factor for realising Ethiopia’s ambitious goal of becoming a “beacon of prosperity” by 2030. One of the fastest growing economies in Sub-Saharan Africa (SSA) before the COVID-19 pandemic, Ethiopia is expected to reclaim its position among the world’s 10 fastest growing economies, growing by 6% on average between 2023 and 2024.^{2,3} However, this forecast growth partly depends on the resilience of Ethiopia and other SSA economies to manage potential shifts in global trade dynamics and foreign direct investment (FDI), which are in turn influenced by geopolitical tensions.⁴

²African Development Bank (AFDB 2023) ³International Monetary Fund (IMF) <https://www.imf.org/en/Countries/ETH> ⁴Zhang, Q. & Reyes, I. (2023)

Ethiopia's latest National Development Plan 2021-2030, which replaces the Growth and Transformation Plan (GTP), includes equitable participation of women (and children) as one of six key pillars for achieving its ambitious targets towards national prosperity. In particular, the plan highlights women's asset ownership and access to and participation in education as key, as well as the importance of women in leadership positions. This reflects the recognition by the government of the Federal Democratic Republic of Ethiopia, that women's economic empowerment is a multi-pronged concept, and achieving a wider set of women's political, economic and social rights is fundamental to the sustainable growth of Ethiopia's economy.

Accordingly, Ethiopia's government has introduced national frameworks and supportive policies to promote gender equality, in addition to legalising an agenda and mandate for gender responsive budgeting (GRB), which is being led by the Ministry of Women and Social Affairs (MOWSA) and the Ministry of Finance (MOF) (please see section 4 for more details). All government and policy institutions are also mandated to address women's issues in their policies, laws and development programming.

However, women in Ethiopia continue to face significant gender inequalities in economic empowerment opportunities and outcomes. Women's labour force participation remains low at 46.2%,⁵ and women are disproportionately represented in unskilled and low paying jobs, as well as in unpaid subsistence, care and domestic work. This concentration of women in lower paid jobs and unpaid care work results in high wage inequality, which in turn reinforces women's economic dependency, limits their capacity to accumulate financial and other assets, and curtails their potential contributions to the wider economy.

Underlying these restricted economic outcomes are high levels of gender inequality including in the areas of educational attainment, discriminatory norms around women's paid and unpaid work, violence against women and girls (VAWG) and other practices hindering realisation of women's rights (e.g., child marriage and female genital mutilation (FGM)). Women in Ethiopia also experience inequalities in educational outcomes; while enrolment in secondary education remains very low and is similar for both males and females (35.6% vs 34.3%, respectively), the gender enrolment gap widens for tertiary education (13% enrolment rate for males vs 7.8% for females).⁶ At a broader employment level, women experience poorer working

⁵World Bank (2020a) ⁶World Economic Forum (2022)

conditions than men, including a significant gender pay gap, employment segregation and exposure to violence and harassment. As is the case in many countries, women and girls in Ethiopia have also been disproportionately affected by the COVID-19 pandemic, experienced vulnerability and displacement in the context of various internal conflicts and violence, and felt the effects of climate change including droughts and flooding.⁷ These are covered in more detail in sections 3 and 5 of this report.

As Ethiopia recovers from the impact of the COVID-19 pandemic on the economy and society, investing in economic opportunities for women and girls through interventions in the market is critical. For WEE efforts to be successful, interventions must also address barriers within the enabling environment, including tackling harmful social norms that limit women from being able to equally benefit from and contribute to the Ethiopian economy and society.

Furthermore, addressing the immediate humanitarian needs of conflict-affected communities and displaced people, in addition to efforts to address barriers to women's economic empowerment will be crucial to build community resilience to the lingering impacts of the conflicts and other emergencies (e.g. natural disasters/droughts)

⁷UNFPA East & Southern Africa (2023)

in a sustainable manner. Overall, investing in women's economic empowerment holds promising benefits for both peace and prosperity.

This report presents an overview of gender-inclusive economic development in Ethiopia. Drawing on economic modelling, desk-based research, interviews and expert reviews, the report explores available data and evidence on factors influencing women's economic empowerment in the Ethiopian context. The report applies a holistic conceptual framework for women's economic empowerment that identifies multiple and overlapping factors at three different levels, which combine and interact to influence women's economic empowerment:

- **Structural factors:** Including the policy and programming environment;
- **Normative factors:** Including social and gender-based norms which shape women's engagement in paid and unpaid work, as well as factors such as violence against women and girls (VAWG), which hinder active women's economic participation, rights and wellbeing;
- **Individual factors:** Including human, social and economic capital.

The report identifies key factors at each of these levels with relevance to all sectors. In addition, the report presents specific

findings related to three key/broad economic sectors selected in consultation with country-level stakeholders: (i) Agriculture (Coffee, Livestock and Cut Flowers); (ii) Manufacturing (Food Processing, Garments and Textiles, with Cotton Farming also briefly analysed as 60% of cotton demand from the Ethiopian textiles industry is met by local cotton production⁸); and (iii) Construction - a spotlight analysis.

Part of a series of reports commissioned on Sub-Saharan Africa, this report aims to provide practical recommendations for public and private sector partners to improve and expand women's economic opportunities and contribute more meaningfully to women's economic empowerment and building an inclusive society where no one is left behind.

Key findings

The sectoral analysis identified key trends related to women's engagement in the coffee, livestock, cut flowers, manufacturing and construction sectors. In each of these sectors, women face barriers to economic empowerment, despite the existence of opportunities and entry points for further empowerment across structural, normative and individual levels.

Highlights are summarised below with a detailed explanation of the cross-cutting/

contextual structural, normative and individual factors in section 4 and deeper sector-specific analysis of these factors provided in section 5 of the report. Appendix 3 offers a cross-sectoral table summary of the barriers, opportunities and entry points.

Structural factors

Ethiopia's policy framework is generally supportive of women's economic activity, with discrimination against women deemed unlawful and specific government institutions mandated to address women's issues in policies, laws and programmes.

The National Development Plan (2021-2030) recognises equal participation of women as one of its strategic pillars to achieving prosperity, while the 13-year Industrial Strategic Plan (2013-2025) seeks to bring more women into medium- and high-skilled jobs. Gender is mainstreamed within sector-specific plans for health, education and industry, and all government institutions are required to address women's issues in policies, laws, development programs and projects, creating an enabling environment for women's economic empowerment. Also, through its public procurement system, Ethiopia has adopted a localised approach that could foster opportunities for women-owned businesses. The country's procurement strategy focuses on locally-produced goods and SMEs,⁹ though women

⁸European Commission (2021) ⁹A World Bank study reported that in Ethiopia, female majority owned firms constitute ~16% of businesses with up to 10 employees and constitute slightly over 20% of firms with 101-500 employees. See: Alliance for a Green Revolution in Africa (AGRA) 2021 Synthesis Report: Value4Her. <https://agra.org/wp-content/uploads/2021/07/11-Value4HerEthiopia.pdf>

still face competition as there are no direct provisions (e.g. quotas) for gender equality in public procurement policies and practices.¹⁰

However, policy implementation gaps remain as activities are not well integrated and balanced across political, economic and social spheres. These gaps include a historic lack of political will and suppression of the budding women's movement, ineffective coordination across agencies and service sectors, a lack of data and studies on policy effectiveness, inadequate addressing of gender norms and insufficiently inclusive policy development processes.¹¹

Furthermore, customary laws continue to affect the business environment in ways which discriminate against women both directly and indirectly; for example, despite clear policy commitments towards enabling women's property and land rights, customary laws continue to deny women's right to own and control rural land.¹² Furthermore, women's access to formal justice is limited in some (mostly rural) parts of the country, and in most contexts, women are excluded from participating in councils of elders, limiting their access to free and fair hearings in the traditional court system.¹³

Noteworthy is that the Ethiopian government has implemented impactful

interventions to support women's economic empowerment; for example, the government-led large-scale land certification programmes (First-Level Land Certification (FLLC) that occurred between 1998 and 2004, and Second-Level Land Certification (SLLC) from 2005) to register land of smallholder farming households in rural areas across the four highland regions: Amhara, Oromia, Southern Nations, Nationalities and Peoples' (SNNP) and Tigray.¹⁴ This Joint Land Certification Programme (JLCP) that mandates issuing the land ownership certificate in the name of both spouses has improved women's socioeconomic status, within their households and in society.¹⁵ Specifically, the SLLC was found to lead to a 10% increase in the likelihood of accessing credit, an 11% increase in landholding and a 44% increase in women's decision making over crops.¹⁶

Normative factors

Women's economic participation in Ethiopia remains stifled due to the burden of unpaid care work, unpaid work (i.e. in family's income-generating activities such as farming) and domestic labour. Trends observed in small-scale manufacturing industries (such as food processing) indicated that nearly 58% of female workers were not being remunerated for their labour compared to 40% of men with the same status.¹⁷

¹⁰IDRC (2023a); IDRC (2023b) ¹¹Includovate (2020) ¹²Tura (2014) ¹³US Bureau of Democracy, Human Rights, and Labor (2021)
¹⁴UN Women Ethiopia (2022); USAID (2016) ¹⁵UN Women (2014) ¹⁶USAID (2016) ¹⁷UN Women (2014)

Women contribute across the agriculture value chain but tend to be responsible for more time-consuming and laborious activities. Similarly, in Science, Technology, Engineering and Mathematics (STEM) fields, self-selecting biases foster gender-based segregation in the labour force.¹⁸ There are lower barriers to entering the workforce in sectors such as livestock (though women mostly own smaller animals such as poultry, while men dominate cattle ownership), food processing and textiles, which are, therefore, dominated by women. However, very few managerial positions are filled by women across sectors.

At the executive level, there has been high female political representation in recent years, with a female Head of State and a gender-balanced cabinet.¹⁹ Women's representation in the Federal Parliament (the House of Peoples' Representatives (HPR)) has shown a significant increase from 27.9% in 2010 to 38.8% in 2015²⁰ and to 41.3% in 2021.²¹ The strong female representation in Ethiopia's parliament suggests that Ethiopia's political culture, at the national level, accepts women being in decision-making positions. However, at the regional level, women's political representation remains low. The subnational average share of women in government is 26.9% and progressively decreases from the *woreda* (district) level (29.5%) to zonal (22.8%) and regional state levels (21.9%).²²

Women's decision-making capacity within most Ethiopian households impacts their access to economic opportunities alongside impacting other human development indicators. Furthermore, social norms around women's mobility and rigid gender roles limit economic opportunities outside of the home and access to markets.

Notably, as a policy response to the challenges associated with women's unpaid work, the government introduced the Ethiopian Women Development and Change Packages (2006, 2017),²³ which focus on increasing access to electricity and potable water to reduce time spent on fetching water.²⁴ The Ethiopian government also conducted the first time-use survey in 2013 and has committed to rolling out a national time-use survey focusing on women's unpaid care and domestic work to inform public services planning, budgeting and implementation efforts.²⁵

Individual factors

Gender inequalities in educational access and opportunities, present additional challenges for women to obtain skilled jobs or managerial positions. Education indicators show that males have higher enrolment rates than females across all levels: primary (91.2% for males and 83.2% for females); secondary (35.6% for males and 34.3% for females); and tertiary (13% for

¹⁸OECD (2021) ¹⁹Allo (2018) ²⁰Kassahun, M. & Kidane, B. (2020) ²¹IPU Parline (n.d.b) ²²Kassahun, M. & Kidane, B. (2020)
²³The Ethiopian Herald (2007) ²⁴Includovate (2020) ²⁵Oxfam (2020)

males and 7.8% for females). Noteworthy is that, while enrolment in secondary education remains very low and similar for both males and females, the gender enrolment gap widens for tertiary education. Alongside normative barriers, women's lower educational status leads to women being disproportionately represented in low-status and lower-paying jobs in the informal sector, including household small businesses where their labour may go unremunerated.²⁶

Women in Ethiopia - particularly single women, widows and elderly women, who represent a disproportionate majority of poor households - have limited access to vertical social capital compared to men.²⁷

Women's lower social capital may hinder their access to social safety net programmes aimed at improving economic capital.

It is established that women's participation in cooperatives benefits them, their households and society for various reasons including improved social networks. In 2013, women members constituted only 20% of cooperatives,²⁸ but women's participation in cooperatives is rising. A 2021 report from the Federal Cooperative Agency (FCA) indicated that of 92,755+ cooperatives in Ethiopia with 21+ million members, 32% were female while 68% were male.²⁹ The same report confirmed that the 21,328 primary

SACCOs (Savings and Credit Cooperative Organisations) with ~5.4 million members had 60% female and 40% male members.³⁰ Village Savings and Loan Associations (VSLAs), generally a self-managed group of 20-30 individuals, have also been critical in helping women build their financial skills, gain access to and control over resources, and generate economic opportunities.³¹ Women's VSLAs supported by different development organisations (e.g. UN Women Ethiopia, CARE, Mennonite Economic Development Associates (MEDA), SOS Sahel Ethiopia, etc.) and Savings and Internal Lending Communities (SILC) of Catholic Relief Services (CRS) have been able to achieve some successes associated with building resilient livelihoods,³² unlocking entrepreneurial potential³³ and strengthening financial capabilities among women.³⁴

Ethiopia has a large unbanked population (78% of men and women as of 2021),³⁵ with women accounting for a disproportionate share of the unbanked. Women entrepreneurs typically have less access to finance, land and networking opportunities, despite the sizeable contribution of their micro and small enterprises to job creation and poverty alleviation. Most recent available figures indicate that the gender gap in access to formal financial and banking services is wide; 12% in 2017, from an almost insignificant gender gap in 2014.³⁶

²⁶Ferrant (2014) ²⁷Kebede (2018) ²⁸UN Women (2018); Giving Compass (2018) ²⁹International Cooperative Alliance Africa (ICA Africa) 2021; Federal Cooperative Agency (FCA) n.d. National Cooperative Societies Information. <http://fca.gov.et/> ³⁰International Cooperative Alliance Africa (ICA Africa) 2021; Federal Cooperative Agency (FCA) n.d. National Cooperative Societies Information. <http://fca.gov.et/> ³¹Women Connect (n.d.) ³²MEDA (2019) ³³MEDA (2019) ³⁴MEDA (2019) ³⁵Africa Digital Financial Inclusion (ADFI) n.d. ³⁶World Bank (2018b)

Norms and traditions also influence the sectors that women entrepreneurs can engage in, and affect their mobility (to access information, markets, etc.).

Additionally, women are less likely to own, control or have access to physical assets that serve as collateral.³⁷ This includes land ownership/holding security, financing, agricultural technologies and formal agricultural extension services.³⁸ Women are further limited by the gender gap in digital literacy and the use and uptake of technology; women entrepreneurs are also constrained by lack of business skills and access to information.

Furthermore, a World Bank study assessing the gender gap in agricultural productivity in Ethiopia found that female farm managers produced 36% less per hectare than their male counterparts due to spending less time on business activities (for reasons including the responsibility for domestic work), being unable to hire as much labour as men, being less likely to have business licences and having limited access to formal credit than men (due to inability to meet lending requirements).³⁹ While investment is needed to bridge this gap, potential economic gains from reducing the gender gap translate into poverty reduction and exceed the resources needed to close the gap.⁴⁰

Implications and recommendations

Based on the key findings, the report proposes several practical recommendations and considerations aimed at policymakers, programme owners and researchers - including both those engaged in WEE-focused programmes and initiatives and more general economic development programming which may not have women's economic empowerment as a central objective.

Note: Sector-specific recommendations for consideration are presented in sector briefs in section 5.

Key implications and recommendations for consideration - across three key areas: (i) Policy/Advocacy; (ii) Programming; and (iii) Research, Monitoring and Evaluation are broadly summarised below. Please refer to section 6 for a more detailed breakdown of these implications and recommendations (including suggested strategies).

Noteworthy is that no single actor can independently address all the barriers/implement all the suggested recommendations to women's economic empowerment. A coordinated, multi-pronged and multi-stakeholder approach to tackle barriers and execute solutions is required.

³⁷World Bank (2019) ³⁸Woldu et al. (2013) ³⁹International Bank for Reconstruction and Development (IBRD)/World Bank (2019)

⁴⁰Ethiopia's Ministry of Agriculture and Natural Resources, UN Women, UNDP and UN Environment (2018)

Policy and advocacy recommendations

1. Address key policy gaps and improve implementation and monitoring of key legislation around key issues including public procurement, women's land ownership, girls' education and violence against women and girls.

Recommended strategies for consideration include:

- Advocate for legislation on integrating gender responsiveness into the country's public procurement policy, to include provisions that promote and advance gender equality in public procurement policies and practices.
- Strengthen policies, accountability and remediation mechanisms on equal land ownership, sexual harassment and gender-based violence.
- Address factors contributing to policy implementation gaps including improving coordination across agencies and service sectors, assessing policy effectiveness and implementing inclusive policy development processes.
- Strengthen cooperation across central ministries (e.g. MOWSA), supportive NGOs (including the Christian Relief and Development Associations) and international bodies (e.g. ILO, CEDAW) who have arrived at an agreement to mainstream gender.
- Enable and establish supportive frameworks that account for the experiences and recommendations of the women's movements/advocacy groups in the country.
- Advocate for the government to ratify the ILO convention (190) on Violence and Harassment.
- Increase capacity within the Ministry of Agriculture to deliver gender-responsive strategies by building partnership/convergence with other government ministries, and public and private institutions.
- Advocate for and consider setting a standard legal decent minimum wage in the country.
- Pledge and devise strategic plans for full abolition of child marriage and female genital mutilation (FGM).
- Advocate for greater public investments and incentives to keep girls in school and encourage more engagement in and completion of science, technology, engineering and mathematics (STEM) subjects/disciplines. Also, advocate for gender responsiveness of policies in the science field (e.g. the National Science Policy and Strategy).

2. Undertake community-level sensitisation, capacity building and advocacy around existing legislation to strengthen women's rights.

Recommended strategies for consideration include:

- Train and build the capacity of key duty bearers including traditional customary structures, local governments and law enforcement on key legislation regarding women's right to land ownership, to reduce bias and discrimination against women, and improve transparency and consistency of decision making.
- Strengthen behaviour-change communication focused on gender-equitable land distribution and inheritance, as well as promoting positive non-violent relationships.
- Prioritise women-led households and facilitate community-level conversations and peer-to-peer training with male spouses/male household heads, elders/chiefs, social workers, community health volunteers, teachers and other stakeholders on women's rights and constitutional law.
- Design interventions to strengthen capacities of women farmers, pastoralists and agro pastoralists to increase agricultural productivity and benefit from economic activities.
- Focus on young women and adolescent girls to enable long-term, transgenerational behaviour change and improved educational outcomes.

- Identify community-based role models to act as champions for behaviour change towards gender equality within communities.

3. Advocate to remove gender-based barriers to finance and markets; promote women-friendly financial products and services.

Recommended strategies for consideration include:

- Engage women meaningfully in the design of financial services and products (including mobile money products), to ensure that they are accessible for all women including those most marginalised (such as young women, women with physical or other challenges, rural and illiterate smallholders, etc.).
- Introduce legal and regulatory frameworks that enable women to access credit and criminalise discriminatory practices.

Programming recommendations⁴¹

1. **All programmes should be based on a robust gender analysis that identifies risks and mitigants per proposed intervention.** This is an essential part of good programming for all types of programmes, including those which may not have gender or women's economic empowerment as a core area of focus.

⁴¹For stakeholders directly involved in WEE initiatives and stakeholders involved in general economic development programming not solely focused on women. These stakeholders may be operating at local, national and/or regional levels.

- a. Programmes should also be inclusively designed to cater to the needs, challenges and interests of various groups of women (e.g. young women, mothers, female heads of households).
- 2. Assess and address women's and girls' unpaid care and domestic work burden and address inequitable norms and attitudes at the household level** so that they can complete their education, acquire marketable skills and work for pay outside the household.

Recommended strategies for consideration include:

- Carry out dialogues at household level (including the entire family - men, boys, women and girls) and in communities (or other behaviour change interventions) that promote equitable intra-household decision making, and address gender-inequitable attitudes and norms including around gender roles in the value chain and women's mobility.
- Carefully assess the extent to which project activities could increase women's workloads, and actively incorporate time- and labour-saving interventions targeted at women.
- Work with the private and public sectors to ensure that households have access to energy, water, hygiene and sanitation (WASH) facilities to reduce women's and girls' drudgery and time poverty.

- 3. Work with and grow women's collectives** to build social, human and economic capital, and tackle normative barriers.

Recommended strategies for consideration include:

- Develop robust frameworks around women's VLSAs and Iddirs⁴² to create new and strengthen existing groups.
- Support the formation of new women-led cooperatives with clear succession plans to ensure leadership growth for the youth.
- Ensure that all work to support agricultural value chains includes a focus on supporting women in product aggregation, to reach more lucrative markets, and receive better prices for their goods. This improves economies of scale and profitability.
- Build disaster and climate-resilient strategies that are adopted and integrated into women's collectivisation.
- Ensure equitable access to productive resources and extension services, including through increasing access to digital solutions.
- Support cooperatives to build connections with financial institutions and other service providers.

- 4. Work with women and girls holistically to improve their human capital and wellbeing - building both personal/life skills and business/technical skills.**

⁴²Iddirs are traditional supportive associations for mutual benefit and with voluntary membership that provide aid/support in specific (sometimes emergency) situations and are thus also described as "an informal insurance arrangement". See: Léonard, T. (2013); Aredo, D. (2010)

Recommended strategies for consideration include:

- Ensure education to employment pathways for adolescent girls and young women are clearly determined - moving from secondary education towards accessing higher/tertiary education opportunities.
- Leverage and strengthen Technical and Vocational Education and Training (TVET) efforts.
- Address barriers to girls' education and factors influencing school dropout.
- Target interventions to improve women's voice, decision making and self-efficacy; more equitable norms around leadership and land rights; and opportunities for women to move into new or upgraded roles.
- Provide financial literacy training for women to enable appropriate use of financial services and improved risk management.
- Introduce livelihood diversification opportunities for women including efforts to improve business capabilities, including digital skills.

5. Work with large employers to promote gender-sensitive and safe workplaces.

Recommended interventions for consideration include:

- Strengthen organisations' internal gender capacity⁴³ to improve gender-related

knowledge, attitudes, skills of staff, and enhance institutional policies and practices.

- Implement workplace empowerment programmes that improve women's health knowledge and access to goods and services, including sexual and reproductive health rights (SRHR) literacy, access to affordable contraception and menstrual health products, financial literacy and training addressing both hard and soft skills.
- Endorse and implement gender commitments, which should include gender-sensitive policies, staff training, codes of conduct and ethics, gender-based violence and harassment (GBVH) policies, and anonymous grievance and reporting mechanisms.
- Focus on gender-based violence and harassment, promoting zero tolerance and addressing hostility towards women's unpaid care responsibilities, and ensuring safe and effective reporting mechanisms and referral pathways for survivors of violence.
- Improve working conditions and health and safety for women workers including provision of decent living wages, addressing any gender pay gap, flexible working hours and parental leave.
- Enable digitised wage systems through financial wallets to enable women to receive and control income safely.

⁴³Gender capacity refers to the knowledge and skills to engage with gender-equality issues. See European Institute for Gender Equality (EIGE (n.d.))

- Support policies to proactively procure from women suppliers and women-owned businesses.

6. Address inequitable intra-household dynamics and norms.

Recommended strategies for consideration include:

- Cooperatives, VSLAs and other socioeconomic interventions should consider household approaches that explicitly stimulate discussions, promote gender-equitable attitudes and norms and support families to negotiate about gender roles and norms which guide intra-household decision making and labour.
- Support livelihoods and economic empowerment initiatives coupled with gender-transformative interventions which increase women's access to and control over economic assets and access to financial services, promote their financial independence, reduce their vulnerability to economic and other forms of gender-based violence, and support women's ability to seek services.
- Build on existing efforts to improve understanding of what works to increase women's access to and control over land and other assets.

7. Strengthen public and private sector stakeholder engagement with gender equity.

Recommended strategies for consideration include:

- Incentivise organisations to develop innovative technological and digital approaches that reduce women's burden/drudgery.
- Raise awareness about and accountability for relevant employment law and women employees' rights, including tackling the gender pay gap and workplace-based gender discrimination.
- Focus on women's workplace conditions, including policies and facilities to be safe, equitable and more favourable for women. Investment in gender-sensitive infrastructure both at the workplace and in the community as part of CSR initiatives.
- Advocate for gender-positive and inclusive policies and systematic frameworks among SMEs.

Research, monitoring and evaluation recommendations

1. Commission and undertake research to address research gaps including:

- Studies to assess and explore the fundamental knowledge gaps for informing effective and gender-responsive policies and programmes, with a view to proposing solutions to them.
- Studies and analysis to understand the impact of various regional conflicts on WEE outcomes.

- Studies to understand the dynamics of economic violence such as asset and land dispossession in Ethiopia, as well as what works to prevent and respond to these forms of gender-based violence.
 - Research to understand barriers faced by the most marginalised groups of women including women with physical or other challenges and internally displaced women.
 - Studies to understand the effectiveness of previous and current government interventions such as Ethiopia's Growth and Transformation and Industrial Strategic Plan (2013-2015) plans, along with status of implementation/ adoption of supportive labour rights proclamations.
 - Commission evaluations of Safety Net Programmes and Social Capital programmes, and their intended impact on women.
 - Execute planned research and survey efforts to draw clear and meaningful insights on women's time use and unpaid domestic and care work.
2. **Include measures of key factors enabling or constraining women's economic empowerment** including gender-specific measures focused on women's capabilities and agency, household relations and gender norms and attitudes. This should also include tracking signs of potential backlash including, for example, increased rates of intimate partner violence (IPV).
 3. **At a minimum, disaggregate results by gender** and include gender-disaggregated targets. Wherever possible, programmes and research should further disaggregate by other socioeconomic characteristics including income, age, race, physical or other challenges, migratory status, internal displacement status and geographic location.
 4. **Commission participatory and action research with the most marginalised groups of women**, including internally displaced women, women with physical or other challenges, migrants, widows and young women, to understand the different barriers that women face and to design inclusive programmes.
 5. **Commission mixed-methods research and evaluations** on these issues (i.e. women's capabilities and agency, household relations and gender norms and attitudes, etc.) to understand how and why change happens, and to better understand women's lived realities through participatory qualitative research, and theory-based evaluations.
 6. **Monitor, track and mitigate against any signs of potential backlash** during programme implementation, including increased rates of violence against women.

1. Introduction

Background and objectives

A study leveraging strong coalition to develop and implement country-level strategies to strengthen women's economic empowerment in Sub-Saharan Africa

Euromonitor International in partnership with six other global organisations: (i) International Cooperative Research Group (ICRG), which is the research arm of the United States Overseas Cooperative Development Council (U.S. OCDC); (ii) United States Agency for International Development (USAID); (iii) Mastercard Foundation; (iv) International Development Research Centre (IDRC); (v) United Nations Entity for Gender Equality and the Empowerment of Women (UN Women); and (vi) the African Trade Policy Centre (ATPC), which is a specialised unit within the United Nations Economic Commission for Africa (UN ECA)⁴⁴ (the Steering Committee) launched the Pathways Study in 2020. The aim was to assess which sectors hold the highest potential for women's economic empowerment, explore how women's prospects in these sectors can be strengthened in light of various barriers and drivers, and identify which stakeholders (public and private) are key to achieve this.

⁴⁴International Cooperative Research Group (ICRG), which is the research arm of the United States Overseas Cooperative Development Council (U.S. OCDC), United States Agency for International Development (USAID), Mastercard Foundation, International Development Research Centre (IDRC), United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) and the African Trade Policy Centre (ATPC), which is a specialised unit within the United Nations Economic Commission for Africa (UN ECA). These seven organisations (including Euromonitor International) constituted the Steering Committee (SC).

13 countries covered by the Pathways Study research project, including Ethiopia



The Steering Committee selected 13 countries in Sub-Saharan Africa (SSA) for this exploration of the challenges and opportunities (sectoral and general) of the sub-continent related to women's economic empowerment. Three sub-regions were covered - East Africa, West Africa and Southern Africa - with the country selection including the major economic and political hubs in the SSA region. The Steering Committee's capabilities, country presence and areas/themes of interest (in terms of programming, research and advocacy efforts) were also considered to ensure uptake of the defined actionable solutions.

The Pathways Study programme addresses three key objectives per focus country. These are:

1. Identifying the sectors with the most potential

- Which sectors are forecast to grow fastest over 2020-2030?
- Which sectors have the greatest prospects for women's economic empowerment?
- Which sectors would benefit the most from improved economic participation of women?

2. Understanding the challenges and drivers for women's opportunities in key sectors

- What is the role of women within priority sectors and what are their

prospects for expanded opportunities?

- What are the sector-specific drivers and barriers for women's employment, entrepreneurship and advancement?
- What works to improve/leverage these drivers and overcome these barriers?

3. Developing sector-specific solutions

- What are the actionable and sector-specific solutions, tailored to each country's/sector's context?
- Which stakeholders are well positioned to implement or advocate for these solutions?

1.2 Methodology summary

Euromonitor International designed the Pathways Study to have a sustained impact in each country by ensuring that results are locally relevant and actionable. From research design⁴⁵ and scoping to development of recommendations, mixed methods (economic modelling, desk/secondary research, interviews and expert reviews) were utilised to develop findings and validate the proposed recommendations. The Steering Committee and selected country partners also reviewed the analysis of findings and solutions to ensure the recommendations lead to action, and action leads to positive change/impact for women.

The methodology workflow is shown below, while a detailed explanation of the methodology is included in the Appendix.

⁴⁵Design of the Pathways Study had been concluded before the start of the noteworthy Tigray conflict in November 2020. However, where possible and/or applicable, insights on the impact and implications of the conflict on women and the focus sectors are explored via secondary research.



1. Scoping Study and Modelling

Preliminary research and economic modelling

Euromonitor International Research and Analytics Team



2. Selection of 2-3 Focus Sectors

Sector Prioritisation Workshop

Country Working Group Participants

3.

Stakeholder Mapping

Secondary Research and Interviews

Includovate Ethiopia (Country Partner)

4.

Sector Deep Dives – Primary and Secondary Research

Secondary Research and Interviews

Includovate Ethiopia (Country Partner)

5.

Analysis of Findings

Qualitative Analysis, Report Writing

Includovate Ethiopia (Country Partner), Euromonitor International Analysts, Kore Global

6.

Report Finalisation



Recommendations Workshop, Expert Reviews

Country Working Group Participants, Includovate Ethiopia (Country Partner), Euromonitor International Analysts, Kore Global, Thematic and Sector Experts, Steering Committee

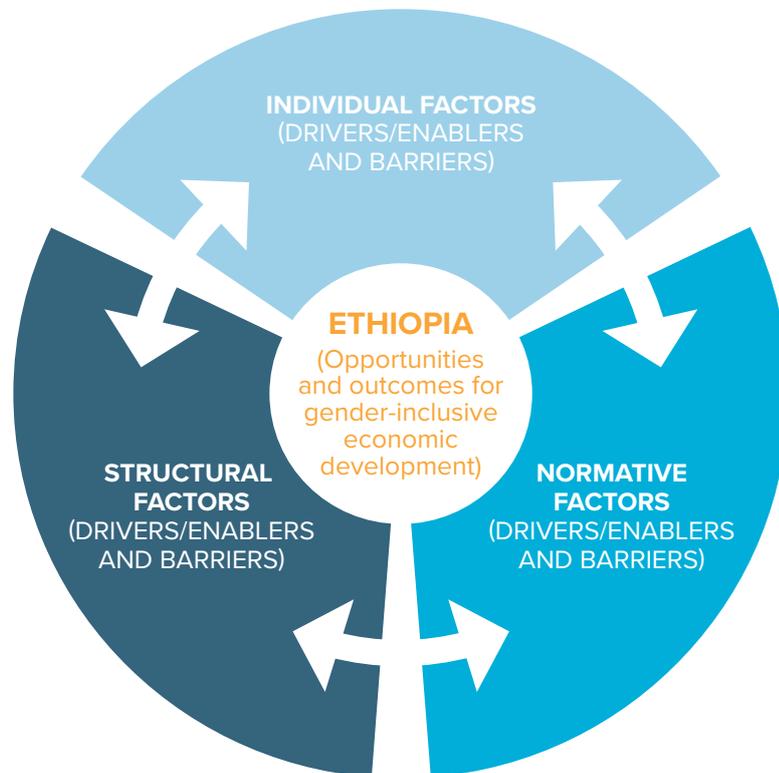
2. Conceptual framework for understanding women's economic empowerment

Women's economic empowerment (WEE) can be understood as: "Women having the ability to succeed and advance economically, and the power to make and act on economic decisions to enhance their broader wellbeing and position in society."⁴⁶

Women's economic empowerment is much broader than labour market participation.⁴⁷ It involves both women's acquisition of resources and the exercise of power and agency in all economic domains and market-related interactions.⁴⁸ It recognises that individual women operate within contexts of both informal (normative) and formal (structural) barriers and enablers.⁴⁹ And, as a result, women's economic empowerment is highly context-specific both in terms of women's aspirations and the enablers and barriers that they experience.⁵⁰

⁴⁶Calder et al. (2020) ⁴⁷Nazneen et al. (2019) ⁴⁸Earning, spending, and saving income; buying, owning, and selling assets; holding and inheriting wealth; starting and operating a business; acquiring a bank account or credit (Fox and Romero, 2017) ⁴⁹Kabeer (2021); Fox and Romero (2017) ⁵⁰Calder and Boost (2020); Fox and Romero (2017); Field et al. (2010); Hanmer and Klugman (2016)

Conceptual framework for understanding women's economic empowerment



This report applies a holistic framework to understand barriers and enablers to women's economic empowerment in Ethiopia at three distinct levels including structural, normative and individual.

Factors at these three levels combine and interact to influence WEE opportunities and outcomes. For example, barriers at different levels can interact to limit women's opportunity to collectively engage in and shape market institutions; their access to suitable services and assets; and their choices

relative to men's, thereby contributing to their greater representation in marginal, unregulated and precarious forms of work with low and unstable earnings and few, if any, social protections. Segregation can occur along several fronts - occupation, sector, status in value chains, profit potential and level of risk - and is stubbornly persistent in informal labour markets, despite low barriers to entry, due to this vicious interplay between individual, normative and structural constraints.

Structural factors

Government policies, laws and regulations - whether formulated at the national or sub-national level - create a structure that directly or indirectly constrains women's participation in the economy.

Macro-level economic policies are often thought of as “gender neutral”, as they cover policy areas such as public and private investment, macroeconomic stability, rules for international trade, financial regulatory powers and policies, and public expenditure allocation and management. In most cases, these policies are not designed with WEE outcomes in mind, but they affect women and men differently because of their different positions in the economy and society, shaped and reinforced by existing gender norms.

Examples of policies that directly influence women's ability to start, run and grow their businesses include:

- Macro-level economic policies around trade and taxation;
- Credit and finance policies;
- Regulations around access to markets; and
- Laws (including customary law) on property ownership and inheritance.

Policies can also indirectly influence women's economic empowerment.

These may include:

- Policies on the marketisation and subsidisation of the care economy and the recognition of unpaid care responsibilities;
- Education policies that support girls' and young women's participation and achievement, and their pathways to employment; and
- Prevention and response mechanisms to gender-based violence.

Normative factors

Gender norms circumscribe women's capabilities well before they enter the labour market, as norms affect the whole skill development process of children and youth; for example, how much and what kind of education and other learning opportunities are made available.⁵¹ Norms invest dominant household members, usually men, with the authority to determine how resources are allocated and how women and girls use their time.⁵² The role of gender norms and relational agency is thus important to examine as a factor enabling or constraining women's economic outcomes.

Social and gender norms around women's economic empowerment are not static, and large-scale macro-level changes - in for example educational levels or conflict situations, as well as the hard work and advocacy of women's rights movements - can drive positive shifts in behaviour and attitudes over time.

⁵¹Calder et al. (2021) ⁵²Kabeer (2021)

Norms play an important role in explaining many labour market phenomena, such as persistent gender segregation, low or declining female labour force participation (FLFP), women’s lower returns to human capital and experience in the world of work, women’s double burden of paid and unpaid work, household decision making, the aspirations of women and girls,⁵³ and the availability of relevant products and services for women in the market (for example, financial products and services, good-quality affordable childcare and private/domestic infrastructure). These gendered norms focus on five key areas:

- **Women’s time use**, including responsibilities assigned to women for domestic and care, paid work and leisure time;
- **The desirability, suitability and respectability of different types of activity and work** for men and women, including whether girls and young women should attend school, acquire certain skills (e.g. digital literacy), whether women should work outside of the home, work in mixed-gender environments and run a business;
- **Voice, representation and leadership in decision making** in the household, the community, the market and the state;
- **Women’s freedom of mobility**; and
- **The frequency, intensity and acceptability of violence against women and girls (VAWG) including sexual harassment.**

Individual factors

Capital can be embedded in humans (human capital), embedded in society (social capital) or possessed in the form of a tangible asset, by an individual, a household or a group (economic capital).

Capital is especially important for women entrepreneurs to navigate the “structures of constraint” they face in doing business. Yet evidence suggests that women suffer capital deficits relative to men and that this affects their business performance.⁵⁴

Human capital includes business, entrepreneurial, vocational and sectoral information, knowledge and skills, and an understanding of key policies and regulations; basic cognitive skills such as literacy and numeracy; financial and digital skills; and social-emotional skills such as aspiration, self-esteem, goal setting and communication. Uneven investment in girls’ and young women’s human capital creates “pre-existing” constraints that are exacerbated through unequal access to market services, opportunities and economic and social capital.⁵⁵

⁵³Marcus (2021) ⁵⁴McKenzie et al. (2021); Batista et al. (2021) ⁵⁵Calder et al. (2021)

The exercise of individual choice is significantly enabled by stores of social capital. Social capital refers to networks, rooted in norms and social trust, that facilitate coordination and cooperation for mutual benefit, and that are informed by long-standing values of solidarity and mutuality.⁵⁶ Women are often further limited by their disproportionate reliance on horizontal social networks - connections and relations between those in similar socioeconomic situations - as compared to vertical networks with people of different socioeconomic standing. However, horizontal social capital can be valuable to women insofar as it enables them to join with others in collective action, for example through collective enterprises.

Finally, economic empowerment requires women to access and control economic capital including financial assets such as earnings, savings and investments; productive assets such as business equipment (including phones), inventory and inputs, livestock, and land; and private/domestic infrastructure assets such as fuel-efficient stoves, durable housing and solar power that increase women's ability to engage in paid work.⁵⁷

Given an enabling environment, these interlinked forms of capital support women to exercise greater choice and agency in relation to their work. Therefore, the lack of capital is more of a problem for women: firstly, because systemic and structural constraints allocate more opportunities to build capital to men; and secondly, because women need more capital than men simply to overcome structural constraints and engage in markets productively and profitably.⁵⁸

⁵⁶Adato and Hoddinott (2008) in Calder and Tanhchareun (2014) ⁵⁷Calder et al. (2021) ⁵⁸Calder et al. (2021)



3. Country context

3.1 Demographics and geography

Ethiopia, officially the Federal Democratic Republic of Ethiopia, is a landlocked country in the Horn of Africa, which shares its borders with Eritrea, Djibouti, Somalia, Kenya, South Sudan and Sudan. Ethiopia has a total area of 1,100,000 square kilometres (420,000 square miles). Much of the country's landmass is part of the East African Rift Plateau and has a general elevation ranging from 1,500 to 3,000 metres above sea level.⁵⁹

⁵⁹Ethiopia Topography (2022)





National sources report an estimated 2021 population of 98 million (excluding the Tigray region and non-conventional households),⁶⁰ though other international sources estimate a higher figure of 120.3 million as of 2021.⁶¹ Ethiopia is the second most populous country in Africa and has one of the youngest and fastest-growing populations globally with one in three people aged between 10-24 years.⁶² The country is predominantly rural with over 75% of its population living outside of urban areas.⁶³ Only 21.7% of the total population lived in urban areas as of 2020,⁶⁴ with Addis Ababa as the major urban centre. With consistent population growth of more than 2.5%⁶⁵ every year, it is projected that by 2030, the population will be upwards of 145 million.⁶⁶

Ethiopia is an ethnically diverse country in terms of minority and indigenous representation, **with over 90 ethnic groups⁶⁷ and over 80 spoken languages;** the largest ethnic groups are the Oromo and Amhara with shares of 34% and 29.8%, respectively.⁶⁸

Historically, Ethiopia has experienced widespread migration flows given its position as a landlocked region in the Horn of Africa. The country has been a logical transit and destination location for migrants. Since the 1960s, high poverty rates, coupled with climatic hazards and socio-political instability, have led to both

internal and external migration.⁶⁹ Internal migration patterns are determined by climate change, and educational and work opportunities. Additionally, overpopulation, food shortages, poverty, land scarcity, changing agricultural policies and limited resources may also govern migration flows.⁷⁰ In 2019, almost half (49%) of international migrants in the country were female, with most of these migrants (48.5%) aged between 0-19 years.⁷¹ Motivations of unaccompanied minors migrating are linked to escaping exploitation, requiring shelter, psychosocial support, family tracing and reunification, and reintegration into their communities of origin.⁷²

Ethiopia is home to nearly 800,000 refugees from Sudan, South Sudan and Eritrea. With the highest global level of internal displacement in 2018,⁷³ as of April 2020, Ethiopia was the third-largest refugee-hosting country in the continent, with 823,000 refugees and asylum seekers from South Sudan, Somalia and Eritrea. The majority live in 24 refugee camps with about 70,000 having relocated to Addis Ababa.⁷⁴

Ethiopia has historically had relatively high levels of internal displacement - due to both conflict/violence and natural disasters/environmental challenges. For example, from January to June 2018, there were about 1.4 million (newly) internally

⁶⁰Central Statistical Agency (CSA) Ethiopia. 2021 Labour Force and Migration Survey Key Findings ⁶¹World Bank Databank <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=ET> ⁶²UNFPA (n.d.) ⁶³World Bank (2018b) ⁶⁴According to World Bank 2018 estimates See: <https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS?locations=ET> ⁶⁵World Bank (2020a) ⁶⁶The World Counts (2022) ⁶⁷Minority Rights (2019) ⁶⁸Central Statistical Agency (CSA) [Ethiopia] & ICF (2017) ⁶⁹CIA Factbook (2021). Ethiopia ⁷⁰Integral Human Development (2020) ⁷¹Integral Human Development (2020) ⁷²Integral Human Development (2020) ⁷³Reliefweb (2018) ⁷⁴UNHCR (2021)

displaced people (IDPs)⁷⁵ fleeing their communities due to ethnic clashes in the Gedeo and West Guji zones in southern Ethiopia, and continued violence in the Oromia-Somali border region.⁷⁶

More recent pivotal events have further impacted the migration of refugees and displaced groups in the country. This includes the Tigray conflict⁷⁷ which lasted for two years from November 2020 to November 2022,⁷⁸ ending with a truce between the government of the Federal Democratic Republic of Ethiopia and the Tigray Peoples' Liberation Front (TPLF).⁷⁹ The conflict was a highly complex humanitarian crisis,⁸⁰ especially as its devastating effects reached other regions especially adjoining Amhara and Afar where there was also widespread internal displacement affecting several thousand women and children including unaccompanied minors. Besides women being subjected to sexual violence, many were forced to leave their homes and left without food for days to feed themselves or their children.⁸¹ The Ethiopian Human Rights Commission (EHRC) reported increased gender-based violence due to the conflict, which was exacerbated by the absence of

police, health and counselling facilities that victims would have had access to, but which had been destroyed in the conflict.⁸² The COVID-19 pandemic also made reporting of crimes more difficult and created significant barriers to survivors accessing front-line response services.⁸³

The Internal Displacement Monitoring Centre (IDMC) has regular and robust statistics on internal displacement for various countries including Ethiopia.⁸⁴

IDMC reports that as of December 2022, there were about ~3.9 million IDPs in Ethiopia due to conflict and violence, mostly in the Amhara, Tigray, Oromia and Somali regions.⁸⁵ IDPs due to disasters (mainly flooding and droughts) were estimated to be 717,000 as of December 2022, with the majority of this due to the drought which affected the Horn of Africa, but also due to flooding in the western region of Gambella in August/October 2022. Somali and Oromia regions were the hardest hit, as they were also affected by conflict and violence. There have also been displacements reported in 2023 due to flooding in various areas including SNNPR, Basketo Special *woreda* (district), East Imi *woreda*, etc.,⁸⁶ and drought in Borena zone (Oromia Region).⁸⁷

⁷⁵The Internal Displacement Monitoring Centre (IDMC) estimated that the 1.4 million newly internally displaced Ethiopians was comprised of ~1 million people displaced in Gedeo and West Guji regions, ~200,000 displaced by violence in the Oromia-Somali border region, and ~200,000 people displaced due to various other smaller insecurity incidents. See: United Nations Office for the Coordination of Humanitarian Affairs (OCHA) 2018 ⁷⁶United Nations Office for the Coordination of Humanitarian Affairs (OCHA) 2018 ⁷⁷Horwood and Frouws (2021) ⁷⁸The Tigray conflict was triggered when the Tigray People's Liberation Front (TPLF) attacked the Ethiopian National Defense Forces Base located in Tigray region. See: Federal Democratic Republic of Ethiopia: Office of the Prime Minister Press Release (4 November 2020) <https://www.ethioembassy.org.uk/wp-content/uploads/2020/11/November-4-Press-Release-.pdf> ⁷⁹The Agreement for Lasting Peace and Cessation of Hostilities was signed by the Government of the Federal Democratic Republic of Ethiopia and the Tigray Peoples' Liberation Front (TPLF) on 2 November 2022. See Ethiopian Human Rights Commission (EHRC) 2022 ⁸⁰Horwood and Frouws (2021) ⁸¹Trocaire (2021) ⁸²Ethiopian Human Rights Commission (EHRC) 2021 ⁸³Devex (2021) ⁸⁴Internal Displacement Monitoring Centre (IDMC) - Country Profile - Ethiopia ⁸⁵Internal Displacement Monitoring Centre (IDMC) - Country Profile - Ethiopia ⁸⁶Internal Displacement Monitoring Centre (IDMC) - Country Profile - Ethiopia ⁸⁷International Organisation for Migration (IOM) 2023 <https://dtm.iom.int/ethiopia>

Though these internal displacement figures are not gender disaggregated, women and children remain the most vulnerable, with the combined impacts of drought and conflict threatening their food security and physical safety. Food assistance and other psychosocial support was crucial in all regions affected by the Tigray conflict (including Amhara and Afar regions), though various hindrances (e.g. looting, roadblocks, etc.) limited the provision of needed aid to IDPs.⁸⁸ Shortages of food and critical daily supplies including women’s sanitary items and nutritious baby/child meals were therefore prevalent.⁸⁹ In addition, the escalating tensions during the conflict fundamentally impacted Ethiopia’s economic recovery prospects.⁹⁰ The consequences of the conflict remain as damage to land and destruction of other assets, as well as persisting drought, pose challenges to farmers trying to start over.⁹¹

Various governmental and non-governmental institutions have been supporting displaced people including women and children after their displacement. For example, in relation to the Tigray conflict, the Ethiopian Human Rights Commission (EHRC) disseminated educative messages through the media and the EHRC website to increase women’s and children’s awareness of their rights and commemorate the celebration of the 16 Days Activism against Gender-Based Violence and International

Women’s Day. This was in addition to research and monitoring, and stakeholder consultations on findings and advocacy for change.⁹²

The Ethiopian Human Rights Commission (EHRC) and the Office of the United Nations Office of the High Commissioner for Human Rights (OHCHR) conducted a detailed joint investigation into alleged human rights violations during the Tigray conflict including their gender dimension. Besides gathering confidential accounts from victims and witnesses (of alleged violations and abuses) and interviewing other key stakeholders, the investigation is intended to foster accountability, advocate for effective recourse/redress and propose actionable recommendations to avoid recurrence. Kindly refer to the investigative report⁹³ for more detail on the conflict and its persisting impact on women’s economic empowerment in Ethiopia.

Ethiopia also experiences high levels of food insecurity and natural resource vulnerability exacerbated by climate change. Rainfed agriculture contributes almost half of the national gross domestic product (GDP) and is the main form of livelihood for approximately 85% of the population.⁹⁴ Accordingly, the rural livelihoods system, including crop cultivation, pastoralism and agro pastoralism, is highly sensitive to climate change. With 10% of the

⁸⁸Internal Displacement Monitoring Centre (IDMC) - Country Profile - Ethiopia ⁸⁹Ethiopian Human Rights Commission (EHRC) 2021 ⁹⁰Smith, E. (2021) ⁹¹Internal Displacement Monitoring Centre (IDMC) - Country Profile - Ethiopia ⁹²Ethiopian Human Rights Commission (EHRC) 2023 ⁹³Ethiopian Human Rights Commission (EHRC) and the Office of the United Nations High Commissioner for Human Rights (OHCHR) 2021 ⁹⁴USAID Climate Links (2016)

population experiencing food insecurity, climate vulnerability is already negatively impacting livelihoods.⁹⁵ Droughts continue to be the single most destructive climate-related natural hazard in Ethiopia. Extreme temperature fluctuation, along with erratic rainfall and drought, increase climate-related risks associated with agriculture production, livestock, water resources and overall human health.⁹⁶ Women farmers are particularly exposed to the negative impacts of such climate extremes due to gender inequalities in access to education, financial services and technology.⁹⁷ For example, a study in the Lalibela district of Ethiopia reported that girls spent up to six hours daily fetching water - four hours more than previously; this in turn impacts their ability to attend, remain and succeed in school.⁹⁸

More than 85% of Ethiopia's greenhouse gas emissions are due to agriculture and deforestation, while industrial and building sectors, and power and transport sectors contribute 3% each.⁹⁹ By the year 2045, it is estimated that these adverse climate changes may reduce the country's GDP by 10% given the impact on agricultural productivity.¹⁰⁰ As a response, the government of Ethiopia has launched several major climate mitigation and adaptation policy initiatives. These include the Climate Resilient Green Economy Strategy, which lays out approaches to ensure that the country reaches middle-income status by

2030, while keeping greenhouse gas emissions low.¹⁰¹ To promote food security, Ethiopia's flagship public works scheme, the Productive Safety Net Programme (PSNP), aims to support drought-affected households.¹⁰² An empirical study found that PSNP beneficiaries are more likely to be food secure and less likely to experience harvest losses as a consequence of droughts.¹⁰³ Furthermore, as a part of Ethiopia's National Adaptation Plan (NAP-ETH), detailed recommendations for gender-specific adaptation strategies have been articulated to address social norms, enhance the socio-economic participation of women, and support livelihood opportunities for women.¹⁰⁴

Recommendations for Integrating Gender Considerations in Implementation of the NAP-ETH Adaptation Options¹⁰⁵

RECOMMENDATION #1: Address attitudes, social norms and personal security issues that exacerbate vulnerability to climate change.

RECOMMENDATION #2: Address imbalances in access to information and knowledge for adaptation.

RECOMMENDATION #3: Promote equitable access to and control over national resources for adaptation.

RECOMMENDATION #4: Facilitate equitable access to services that enhance adaptive capacity.

⁹⁵USAID Climate Links (2016) ⁹⁶USAID Climate Links (2016) ⁹⁷Farm Africa (n.d.) ⁹⁸Gemechu, L. (2022) ⁹⁹USAID Climate Links (2016)

¹⁰⁰USAID Climate Links (2016) ¹⁰¹Devonald et al. (2022) ¹⁰²Devonald et al. (2022) ¹⁰³Scognamillo, A., Mastorrillo, M. & Ignaciuk, A. (2022)

¹⁰⁴Devonald et al. (2022) ¹⁰⁵Environment, Forest and Climate Change Commission (2018)

Indicator	Female	Male	Source
Population* under poverty line in Ethiopia, % (2019)	22.5	23.0	UN Women
Population* under poverty line, average for Sub-Saharan Africa, % (2019)	44.2	43.5	UN Women
Odds of developing food insecurity: female-headed households vs male-headed households (2020)	1.9		Public Health Review Journal

Note: *The indicator is based on country's total female/male population

3.2 Human development

Ethiopia is ranked 173 out of 189 countries and territories as per the Human

Development Index for 2019.¹⁰⁶ With a value of 0.485, the country is positioned in the “low human development” category.^{107,108} Approximately one quarter of the Ethiopian population lives in absolute poverty with almost the same percentages of men and women.¹⁰⁹ Female-headed households accounted for 22.1% of all households in 2019.¹¹⁰ According to a meta-analysis and systematic review exploring the relationship between female-led households and food security, it was found that female-led households are 1.9 times more likely to develop food insecurity in comparison to male-headed households.¹¹¹ While there have been significant improvements in lowering poverty levels since the 2000s,¹¹² challenges remain. For example, poverty is fuelled by high food prices, low rates of educational enrolment, access to sanitation and unmet reproductive health needs.¹¹³

As per the Global Gender Gap Report (2022), the women's labour force participation rate is 72.3% compared to 84.7% for men.

Education indicators show that males have higher enrolment rates than females across all levels: primary (91.2% for males and 83.2% for females); secondary (35.6% for males and 34.3% for females); and tertiary (13% for males and 7.8% for females).¹¹⁴ Noteworthy is that while enrolment in secondary education remains very low and similar for both males and females, the gender enrolment gap widens for tertiary education.

Ethiopia has varying results in gender indicators; for example, looking at the Global Gender Gap Index, while ranking 117th globally in 2018, the country improved by 0.111 points to rank 82nd in 2020 but dropped to 97th place in 2021.¹¹⁵

Improvements in economic participation/opportunity and educational attainment saw Ethiopia rank 74th in 2022.¹¹⁶ As a result of inconsistent progress, Ethiopia continues to experience significant gender disparities across sectors, mostly ranking average compared to other SSA countries. Global gender indices highlight challenges associated with women's secondary education status, income disparity and political representation. (See table below)

¹⁰⁶UNDP (2020a) ¹⁰⁷The HDI indicators are compiled into a single number between 0 and 1.0, with 1.0 being the highest possible human development. HDI is divided into four tiers: very high human development (0.8-1.0); high human development (0.7-0.79); medium human development (0.55-0.70); and low human development (below 0.55). ¹⁰⁸UNDP (2020a) ¹⁰⁹Negesse et al. (2020) ¹¹⁰Euromonitor International (2019). Pathways Study (WEE-SSA) Scoping Report; World Bank (2019d) ¹¹¹Negesse et al. (2020) ¹¹²World Bank (2014) ¹¹³World Bank (2014) ¹¹⁴World Economic Forum (2022) ¹¹⁵World Economic Forum (2020) ¹¹⁶World Economic Forum (2022)

Index	Score	Insights on score
<p>Africa Gender Index (2019) Composite index on the status of gender equality progress in Africa on closing gender gaps - education, jobs, wages, participation in politics and leadership roles <i>(closer value to 1 indicates less inequality; score of 1 implies parity between men and women)</i> Africa average: 0.486 East Africa average 0.518¹¹⁷</p>	0.487	Ethiopia has established strategies, policies and institutions to encourage investment and create employment opportunities, e.g. through industrial parks. Also, gender equality legislation has been enacted and promoted at local level, though women's political and professional participation is still relatively low. Ethiopia's sub-indices scores are: 0.542 (economic dimension), 0.863 (social dimension) and 0.247 (empowerment and representation).
<p>Gender Inequality Index (2019) Composite measure reflecting inequality in reproductive health, empowerment and labour <i>(lower score is better)</i> Global average: 0.436 SSA average: 0.570¹¹⁸</p>	0.517	Ethiopia scores above the SSA average on most indicators except "portion of female population with at least secondary education" (11.5% for Ethiopia vs 28.8% SSA).
<p>Global Gender Gap report (2022) Economic participation and opportunity, educational attainment, health and survival, and political empowerment <i>(higher score is better)</i> Global average: 0.681 SSA average: 0.697¹¹⁹</p>	0.710	Ethiopia ranks 15th among 36 SSA countries covered, and 74th among 146 countries globally. The country records improved scores across all subindexes except "health and survival" which remains unchanged. Ethiopia scores 0.600, 0.854, 0.971 and 0.416 on economic participation and opportunity, educational attainment, health and survival, and political empowerment sub-indexes, respectively. Women make up 26.5% of legislators, senior officials and managers and 32.6% of professional and technical workers. 40% of ministerial positions are occupied by women. comprise 21.4% of parliament.

- = Among the top scoring countries in SSA
- = Among the worst scoring countries in SSA
- = Average score based on SSA averages

¹¹⁷African Development Bank (AFDB) and UN ECA (2019) ¹¹⁸UNDP (2020) ¹¹⁹World Economic Forum (2022)

Index	Score	Insights on score
<p>Women's Workplace Equality Index (2018) Accessing institutions, building credit, getting a job, going to court, protecting women from violence, providing incentives to work and using property <i>(higher score is better)</i> Global average: 64.79 SSA average: 57.86¹²⁰</p>	62.1	<p>Extremely poor performance on availability of building credit (0.0/100). Poor performance on provision of incentives to work (16.7/100) and on ease of getting a job (43.3/100). The law does not prohibit discrimination by creditors based on gender and marital status. Mothers are not guaranteed an equivalent position after maternity leave. Ranks 17th out of 47 SSA countries.</p>
<p>Gender Parity Score (2019) Measures distance from gender parity and takes into consideration gender equality at work and in society <i>(higher score is better)</i> Africa average: 0.58¹²¹</p>	0.63	<p>Extremely high disparity in legal protection and political voice (0.47) and in gender equality at work (0.54). Few women occupy leadership positions (0.41). High disparity in terms of unpaid care work (0.43) and a large proportion of women have an unmet need for family planning services.</p>
<p>Women, Business and the Law (2021) Measures legal regulations affecting women's economic opportunity via eight indicators: mobility, workplace, pay, marriage, parenthood, entrepreneurship, assets and pensions <i>(higher score is better)</i> Global average: 76.1 SSA average: 71¹²²</p>	76.9	<p>Worst performance on laws affecting women's pay (25/100) and laws affecting women's work after having a child (60/100). Women are not equally remunerated for work of equal value, are not allowed to work in jobs deemed dangerous in the same way as men, as well as industrial jobs in the same way as men.</p>
<p>SDG Gender Index (2022)¹²³ 14 of the 17 Sustainable Development Goals (SDGs) and 51 issues ranging from health, gender-based violence and climate change <i>(higher score is better)</i> Global average: 67.8 SSA average: 52.0</p>	49.8	<p>With an increase in score of 1.3 points, Ethiopia was classified as having made some progress (from 2015 to 2020), ranking 125th out of 144 countries globally.</p>

- = Among the top scoring countries in SSA
- = Among the worst scoring countries in SSA
- = Average score based on SSA averages

¹²⁰CFR (n.d.) ¹²¹Moodley et al. (2019) ¹²²World Bank (2021) ¹²³Equal Measures 2030 (2022) EM2030

Women with physical or other challenges face double discrimination and are largely excluded from public life. Almost one in 10 people (9.3%) of the Ethiopian population are estimated to live with some form of physical or other challenges.¹²⁴ Of these, 2.4% were found to have a profound disability and live in great difficulty.¹²⁵ People with physical or other challenges continue to experience social exclusion including lower educational achievement and lower access to employment, higher poverty rates, stigma and discrimination.¹²⁶ Although under researched, women and girls with physical or other challenges in Ethiopia face double discrimination, both in terms of their gender and their bodily or other challenges.

Women in Ethiopia face constraints to realising their sexual and reproductive health rights (SRHR). For every 100,000 live births, 412 women die from pregnancy related causes.¹²⁷ The adolescent birth rate stands at 66.7 births per 1,000 adolescent girls between the ages of 15-19 years.¹²⁸ Harmful traditional practices such as food prohibition, home deliveries and discarding colostrum exacerbate women's reproductive issues and undermine women and their children's nutritional status.¹²⁹ This is compounded by the limited availability of quality services, and unmet demand for routine quality healthcare affected by drought, conflict or disease outbreaks in the region.¹³⁰

Ethiopia has one of the highest levels of unmet need for contraception and family planning in Africa. Unmet need for family planning stood at 22% in 2020,¹³¹ and the prevalence of unintended pregnancies was 28%.¹³² There are some regional variations to unmet needs for family planning based on socio-demographic factors. Southern Nations, Nationalities and People's Region (SNNPR) accounts for the highest unmet need in the country at 30.6%, followed by the Oromia Region at 29%.¹³³ However, the prevalence of modern contraception has increased from 8% in 2000 to 44% in 2019.¹³⁴

Women in Ethiopia experience inequalities in access to health information including comprehensive knowledge about HIV/AIDS prevention, treatment and services.¹³⁵

Trend analysis highlights knowledge is greatest among men aged 20-29 years, with 38% of men having comprehensive knowledge concerning HIV prevention in 2016, compared to 4% of adolescent girls and 19% of adult women.¹³⁶

Women experience inequalities in educational outcomes, with average literacy rates lower than SSA averages.

The overall literacy rate of both men and women is lower than regional averages, with only 44% of women literate compared to 59% of men.¹³⁷ While progress has been made in increasing overall access to education, there is still differential access and enrolment

¹²⁴UNICEF (2018b) ¹²⁵UNICEF (2018b) ¹²⁶UNICEF (2018b) ¹²⁷USAID (2021) ¹²⁸Tadesse et al. (2020) ¹²⁹Tadesse et al. (2020)

¹³⁰USAID (2021) ¹³¹Ethiopian MOH (2021) ¹³²Alane et al. (2020) ¹³³Alane et al. (2020) ¹³⁴Girma Garo et al. (2021) ¹³⁵UNICEF (2019)

¹³⁶UNICEF (2019) ¹³⁷World Economic Forum (2021)

rates among regions and between genders, with adolescent girls being particularly vulnerable.¹³⁸ Approximately 1.6 million primary and secondary school-aged girls are not in school, and 75% of secondary school-aged girls do not attend secondary and tertiary schools.¹³⁹ The dropout rate for girls is higher at the upper primary level, linked to gender norms associated with early marriage.¹⁴⁰ Other contributing factors to girls' lower education status include cultural norms, quality of education, poor enabling environments in school, lack of gender-responsive pedagogies, distance and mobility, and gender-based violence.¹⁴¹

Women in Ethiopia experience high levels of violence against women and girls (VAWG), harmful traditional practices and a highly discriminatory environment. The high prevalence of gender-based violence and harmful traditional practices hinders women's rights, wellbeing and access to economic opportunities. Nearly 65% of all women in Ethiopia have been subjected to female genital mutilation (FGM).¹⁴² Home to nearly 15 million child brides, Ethiopia has one of the world's highest rates of early marriage.¹⁴³ Furthermore, intimate partner violence (IPV) is not uncommon: 69% of ever-married women (aged 15-49) who had ever experienced sexual violence, reported their current husband/partner as perpetrators while 30% reported former husbands/

partners.¹⁴⁴ Also, 12.9% of adolescent girls (aged 15-19) have been subjected to intimate partner violence (IPV),¹⁴⁵ while approximately one in 10 women in Ethiopia have experienced abduction, early marriage and marital rape.¹⁴⁶

Women's lower social status is exacerbated by biased and derogatory language embedded in casual communication across major Ethiopian languages. This includes highly problematic feminised insults and idiomatic expressions that place women on a lower economic, social and professional footing than men.¹⁴⁷ School curriculums are designed to perpetuate women's traditional role in society, limiting their access to economic opportunities.¹⁴⁸

3.3 Status of the economy, labour force participation and employment

Ethiopia is the second-fastest growing economy in Sub-Saharan Africa, with the economy growing by 6.1% in 2020. This growth was facilitated by investments in infrastructure, education and healthcare, improved delivery of basic services and accelerated growth of agricultural and service sectors. While liberalisation has contributed to economic growth, recent socio-political instability has stunted growth. (See table).

¹³⁸USAID (2016) ¹³⁹United Nations Children's Fund Ethiopia (2018) ¹⁴⁰World Bank (2017) ¹⁴¹USAID (2018) ¹⁴²UNICEF (2020)

¹⁴³Reuters (2020) ¹⁴⁴Ethiopia Demographic and Health Survey (2016) ¹⁴⁵Kumar et al. (2017) ¹⁴⁶Gebre et al. (2019) ¹⁴⁷Bekele (2018)

¹⁴⁸Semala et al. (2019)

Indicator	Value	Value	Source
GDP in 2020, USD million		107,645	World Bank
GDP Growth, %	2020	6.06	World Bank
	2021F	2.00	IMF
	2025F	N/A	IMF
Debt-to-GDP ratio in 2020, %		55.2	Passport
Inflation, %	2010	8.14	World Bank
	2015	9.57	World Bank
	2020	0.00	World Bank
	2021F	25.20	IMF
	2025F	N/A	IMF

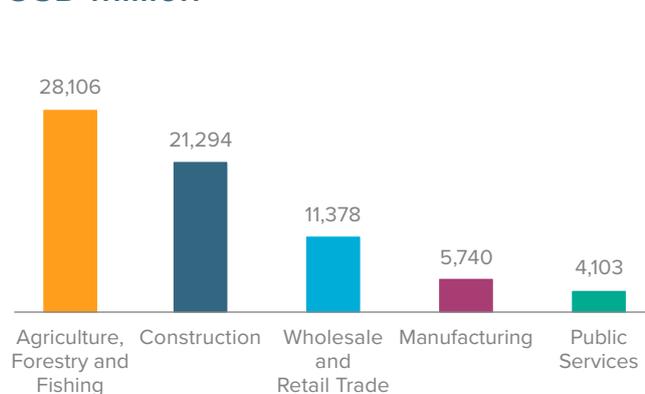
Note: *F=Forecast value

Sources: Euromonitor International, Passport; World Bank; IMF

Most (70%) of the population relies on subsistence agriculture and lives in rural or semi-rural areas. In 2019, Ethiopia's agriculture sector, which employs over 70% of the population,¹⁴⁹ accounted for the largest GDP contribution in gross value added (GVA) at 32%. This was followed by construction (23.9%), services (wholesale and retail

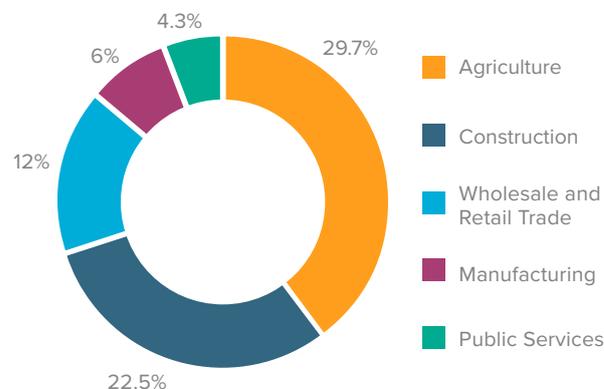
trade, hospitality, transport, storage and communications) at 12.8%, manufacturing (6.4%) and public services (4.6%). Education; transport, storage and communications; and real estate sectors are also expanding, having accounted for 3.9%; 3.9%; and 3.4% of GDP GVA, respectively, in the same year.¹⁵⁰

Top Five Sectors in Ethiopia by 2019 GDP GVA (Gross Value Added) in USD million



Source: Euromonitor International estimates (2020)

Top Five Sub-Sectors in Ethiopia by Share of GDP (2019)

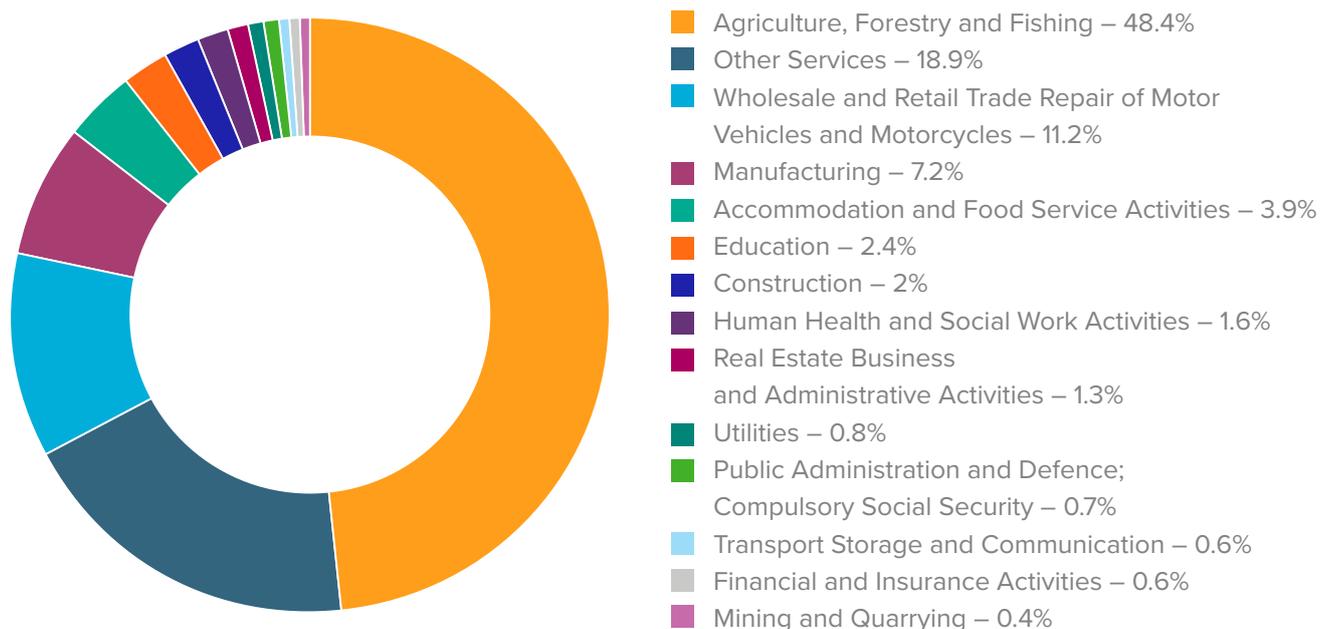


¹⁴⁹CIA Factbook (2021) ¹⁵⁰Euromonitor International estimates from trade interviews and published sources (2019)

Women’s labour force participation remains low, at 46.2%¹⁵¹ compared to 87.9% for men¹⁵² in 2019-2020, and COVID-19 has impacted all women-dominated sectors. The rate of women in vulnerable employment is the highest among SSA countries at 89%.¹⁵³ Women face barriers to labour force participation. Chief among them is the burden of unpaid care and domestic work; lower educational attainment at the secondary and tertiary levels, with enrolment rates lower for females at both levels.¹⁵⁴ (See section 4.3 for detailed analysis of the barriers). Other problematic trends include unemployment, which is as high as 50% among women, high rates of seasonal unemployment (37%) and temporary employment (13%).¹⁵⁵

In 2020, agriculture accounted for 48% of total female employment, followed by the services (42%) and industrial (10%) sectors.¹⁵⁶ At a sub-sectoral level, wholesale and retail trade contributed 11.2% to total female employment, followed by manufacturing (7.2%) and hospitality (3.9%).¹⁵⁷ In agriculture, women perform up to 75% of farm labour, but hold only 18.7% of agricultural land.¹⁵⁸ They lag behind men by 36% in productivity gains, 79% in business sales and 44% in hourly wages.¹⁵⁹ This is partly because of women’s limited access to gender-responsive financial and non-financial services such as from banks, micro finance institutions (MFIs), cooperatives and cooperative unions.

Breakdown of Full-Time Total Female Labour by Sector (2019)



Source: International Labour Organisation (ILO) estimates

¹⁵¹World Bank (2020a) ¹⁵²World Bank (2019a) ¹⁵³Based on ILO modelled data from the World Bank. See <https://data.worldbank.org/indicator/SL.EMP.VULN.ZS?locations=ET> ¹⁵⁴International Monetary Fund (2018) ¹⁵⁵CSA (Central Statistical Agency) Ethiopia and ICF (2017); Ethiopia Demographic and Health Survey (2016); CSA and ICF in World Bank (2019b) ¹⁵⁶International Labour Organization estimates (2020) ¹⁵⁷International Labour Organization estimates (2020) ¹⁵⁸Sustainable Development Goals Fund (2019) ¹⁵⁹Buehren et al. (2019)

Women's workforce productivity also lags that of men.¹⁶⁰ This is especially reflected in the agriculture and enterprise sectors, where female-owned firms underperform across a range of critical determinants, including profitability, survival rate, size and growth trajectory.¹⁶¹ For example, female-managed farms are 24% less productive than male-managed farms.¹⁶² Reasons contributing to this gap are the unavailability of household labour, significant time spent by women on household duties, smaller size of plots allotted to women, alongside low quality of land, and women's limited access to knowledge on improved farm practices.¹⁶³ In 2019, female-owned businesses accounted for approximately 36.2% of all businesses in Ethiopia.¹⁶⁴ Findings from a 6-year study of viability/survival of micro, small and medium enterprises (MSMEs) in Ethiopia to find out if male-owned businesses performed better than female-owned businesses, indicated that the majority of failed businesses (78%) were run by women; furthermore, of the 44% of women-owned businesses, nearly 70% were failed businesses.¹⁶⁵ Inability to obtain loans from formal lending institutions, limitations in reinvesting profit and limited skills (managerial and technical) as well as limited education were identified as key characteristics of these failed businesses.¹⁶⁶

At a broader employment level, women experience poorer working conditions including a significant gender pay gap and

exposure to sexual harassment.¹⁶⁷ In the formal sector, women are often employed in labour-intensive and low-skill sub-sectors.¹⁶⁸ In terms of wage disparity, women earn about 63% less than men - with the wage gap largest in agriculture and smallest in the public sector.

The COVID-19 pandemic has exacerbated gendered challenges for women's economic participation. Overall, the COVID-19 pandemic hit Ethiopia's economy hard, especially as it coincided with a worsening political divide and security situation. An expanding public debt share of GDP (56.6% in 2020), depletion of foreign currency reserves and a locust invasion that destroyed almost 20% of crop production in February 2020 have been contributing factors.¹⁶⁹ Outputs across sectors dropped by five percentage points to 15%,¹⁷⁰ and consumer demand dropped by 10.6%.¹⁷¹ Inflation (including food inflation) remained above 20% in 2020.¹⁷²

The government has responded to the COVID-19 crisis by increasing spending by nearly 20% in 2020. An estimated ETB 85.9 billion was spent on healthcare, water, sanitation and hygiene, food programmes, liquidity extensions to banks, wage subsidies to prevent at-risk job losses, tax waivers and direct business support to micro small and medium enterprises (MSME).¹⁷³ It has also taken foreign loans, estimated at USD500 million, to offset the deficit incurred by this increased

¹⁶⁰World Bank (2019a) ¹⁶¹Aguilar et al. (2014) ¹⁶²International Monetary Fund (2018) ¹⁶³International Monetary Fund (2018) ¹⁶⁴Euromonitor International (2019). Pathways Study (WEE-SSA) Scoping Report ¹⁶⁵Bekele, E. & Worku, Z. (2008) ¹⁶⁶Bekele, E. & Worku, Z. (2008) ¹⁶⁷World Bank (2019b) ¹⁶⁸International Monetary Fund (2018) ¹⁶⁹Allianz Trade (n.d.) ¹⁷⁰European Commission, Nechifor et al. (2020) ¹⁷¹European Commission, Nechifor et al. (2020) ¹⁷²Allianz Trade (n.d.) ¹⁷³European Commission, Nechifor et al. (2020)

spending and revenue losses.¹⁷⁴ For example, in April 2020, the International Monetary Fund (IMF) approved USD411 million in emergency assistance to Ethiopia to help curb the impact of the pandemic.¹⁷⁵

Women experienced the largest drops in employment rates at the onset of the COVID-19 pandemic.¹⁷⁶ In March 2020, 64% of workers that were laid off due to the pandemic were women.¹⁷⁷ Moreover, the dip in earnings appears to have been more severe for female-owned businesses, which generated less than 20% of their previous year's revenue, compared to revenue declines of 10% for male-owned

businesses. There was a sharp decline in some female-dominated employment activities (for example, the garment industry) leading many to migrate to rural areas to survive, while those who remained in the city faced severe food insecurity.¹⁷⁸ A study that utilised phone-based surveys to assess the impact of COVID-19 on firms and households in Addis Ababa found that although coping strategies were similar among men and women in both rural and urban areas, more rural women resorted to reducing consumption (of both food and non-food items), while rural males coped by receiving assistance from family/friends and engaging in other income-generating activities.¹⁷⁹

3.4 Structure and functions of government



Ethiopia's political system at glance

Type of government	Federal Parliamentary Republic
Executive	Prime Minister and Government 30% women (7/23 Cabinet members)
Legislature	Bicameral Parliament House of the Federation (Upper House) - 30.6% women 44/144 ^{180, 181} House of Peoples' Representatives (HPR - Lower House) - 41.3% women (195/472 elected members) ^{182, 183}
Judiciary	Federal Supreme Court, Regional Tribunals
Political parties	Multi-party system since 2018 At present: 29 political parties Ruling party: Prosperity Party, in power since 2018
Governance	Decentralised Republic with two levels of government: Central, Regional
Voting system	First-past-the-post voting

¹⁷⁴European Commission, Nechifor et al. (2020) ¹⁷⁵International Monetary Fund (2020) ¹⁷⁶Abebe et al. (2020) ¹⁷⁷Abebe et al. (2020) ¹⁷⁸Meyer et al. (2020) ¹⁷⁹Wieser, C., Ebrahim, M., & Abebe Tefera, G. (2020) ¹⁸⁰IPU Parline (n.d.a) ¹⁸¹The statutory number of members in the House of Federation is 153, but the currently elected number of members (144) is lower than this. See IPU Parline (n.d.a) ¹⁸²IPU Parline (n.d.b) ¹⁸³The statutory number of members in the House of People's Representatives is 547, but the currently elected number of members (472) is lower than this.

Ethiopia is a federal republic with fully autonomous regional governments.

Ethiopia is a fully decentralised federal republic, divided into 11 regional states and two chartered cities as of 2022. At the sub-regional level, the country is divided into approximately 68 *zones*, 800 *woredas* (districts) and 15,000 *kebeles* (municipalities, the lowest administrative unit), with service delivery responsibilities in the areas of education, healthcare and social security, among others. The federal government allocates grants to the regional governments based on a predetermined formula developed by the House of Federation as per the Constitution (based on relative fiscal gaps per regional state). In the fiscal year 2020/2021, the grants amounted to 37% of the federal budget.¹⁸⁴

Customary laws and grassroots-level authorities are key influencing structures at the local level for various issues including dispute resolution and local governance. Being home to more than 90 ethnic groups, Ethiopia must balance normative diversity with efforts to implement state law across its territory. Through the Constitution, each ethnic group has been given the space to promote its own culture and language, with legal pluralism officially recognised and state, religious, tribal

and traditional legal systems co-existing. Today, conflicts in the areas of family and civil law can legally be resolved using local laws, procedures and mechanisms, if the Constitution is not contradicted, international human rights standards are not violated and all the parties in conflict have agreed. The same rights and respect have been given to religious laws, so that Sharia law and courts have received a special place in contemporary Ethiopia.¹⁸⁵

Customary mechanisms are the most accessible form of dispute resolution for most women, particularly in rural areas.

According to the latest (2021) Afrobarometer survey, traditional leaders in Ethiopia have the highest level of trust (85%) across 22 survey countries in Africa, with 64% being the average.¹⁸⁶ The same survey has shown that these leaders have the strongest influence over dispute resolution (71%), and greater than that of community government (60%).¹⁸⁷ Formal laws and enforcing institutions are outside the reach of the majority due to their high cost, remoteness, rigorous procedures and unfamiliarity with laws/provisions, among other barriers. In addition, pressures from family, religious leaders, or elders discourage women from seeking recourse through regular courts.¹⁸⁸

¹⁸⁴Ethiopian Monitor (2020) ¹⁸⁵Epple and Getachew (2020) ¹⁸⁶Afrobarometer (2021) ¹⁸⁷Afrobarometer (2021) ¹⁸⁸Alemayehu (2021)

3.5 Selected stakeholders – overview of focus areas

Civil society organisations (CSOs) in Ethiopia have successfully influenced laws or provided services to marginalised communities in recent years. Ethiopian civil society is active, well-organised and tackles gender inequalities from a multitude of perspectives. Many civil society organisations and non-governmental organisation (NGOs) provide hands-on assistance to marginalised

groups and have achieved significant impacts, from a collective such as Eгна Legna Besidet repatriating abused Ethiopian domestic workers from the Middle East to Ethiopian Women Lawyers Association (EWLA) advocating to prohibit abductions and forced marriage, and others organising highly visible events to challenge patriarchal norms.

Some notable examples of CSOs working to promote gender equality are presented in the table below.

Organisation	Scope	Advocacy	Research	Programming
Setaweet	Grassroots feminist organisation working on gender-based violence (e.g. by running the Alegnta hotline for victims of gender-based violence), raising awareness on gender equality and conducting gender-sensitive research.	✓	✓	✓
Center for Accelerated Women's Empowerment (CAWEE)	Focus on Ethiopian women entrepreneurs, in particular women exporters, via training, advisory services/business counselling, product development, mentoring, facilitating market linkages for women entrepreneurs and conducting practical research to address their challenges.		✓	✓
Network of Ethiopian Women Associations (NEWA)	NEWA is a non-governmental network established in 2003 to create a stronger advocacy voice for women's advancement. With a national focus, NEWA advocates and lobbies for women's rights in both urban and rural settings. NEWA also created awareness about women's rights by conducting a national assessment for Gender Development Index (GDI), facilitating awareness raising trainings for law enforcement bodies on women's land rights and utilising media campaigns and radio to discuss various topics including women's political participation and leadership.	✓	✓	✓
Association of Women in Business (AWiB)	Networking organisation focusing on economic empowerment and entrepreneurship and raising awareness on gender equality topics such as gender-based violence, women in conflict situations, peacebuilding.	✓		✓

Organisation	Scope	Advocacy	Research	Programming
Egna Legna Besidet	Grassroots collective focusing on domestic workers in the Middle East abused under the kafala system. Activities include direct support (shelter, legal assistance) to workers trying to escape abusive work environments, education on rights, support for victims of gender-based violence, skills training.	✓		✓
Yikono	Grassroots regional organisation focusing on gender-based violence, vocational training for sex workers, COVID-19 mitigation and providing safe shelters for marginalised groups and victims. Operations are disrupted due to the 2020 to 2022 conflict in Tigray region.	✓		✓
Agar Ethiopia	NGO working on residential rescue, rehabilitation and reintegration services for the elderly, mentally ill and victims of trafficking and gender-based violence.	✓		✓
Ethiopian Women Lawyers Association (EWLA)	NGO offering legal assistance to victims of gender-based violence and discrimination and advocating for gender-sensitive legislation.	✓	✓	
Department of Gender Studies, Addis Ababa University	Curriculum development, library with gender-sensitive materials, research and civic engagement.		✓	✓
Womankind Worldwide	Together with local partners, the NGO works to end the most prevalent forms of violence against women and girls in Ethiopia including child marriage, female genital mutilation and domestic abuse.	✓		✓
PROJECT-E	International NGO working to provide job opportunities for young Ethiopian women from underprivileged social backgrounds through sustainable and market-orientated education in a transparent and responsible manner.	✓		✓
Organization for Women in Self Employment (WISE)	CSO working with low-income women in their efforts to become economically empowered, develop resilient families, enjoy equal rights and become active players and beneficiaries in Ethiopian economy.	✓		✓
Ethiopian Women with Disabilities National Association (EWDNA)	EWDNA serves women and girls with physical and/or intellectual disabilities (deafness, blindness, leprosy, autism, etc.). EWDNA focuses on their capacity building, skills acquisition and opportunity inclusion. Also, EWDNA provides various services including rehabilitation, educational training and skills development (via workshops, peer training and counselling), supporting mobility and accessibility, sexual and reproductive health (SRH) and HIV/AIDS education/support. EWDNA also provides economic support, e.g. business skills training, seed/start-up funding and scholarships.			✓

4. Barriers and enablers to women's economic empowerment in Ethiopia

This section provides a detailed analysis of cross-cutting barriers and enablers to women's economic empowerment in Ethiopia. The findings are presented by each domain of the conceptual framework, beginning with structural factors, then moving on to normative and individual factors, all affecting WEE opportunities and outcomes.

4.1 Structural factors

4.1.1 Legal and policy commitments

According to Article 35(1) of the Ethiopian Constitution, women shall enjoy equal rights and protection as men.¹⁸⁹ Steps to ensure fairness and equality include recognising the various Conventions based on the Declaration of Human Rights. These include the Convention on Elimination of All Forms of Discrimination Against Women (CEDAW, ratified in 1981), the Convention on the Rights of the Child (ratified in 1991), and the Convention on the Rights of Persons with Disabilities (ratified in 2010).¹⁹⁰ However, the country has yet to ratify the ILO Violence and Harassment Convention (No. 190).

The Ethiopian government has introduced national frameworks and supportive policies to promote gender equality. This includes the National Policy on Women (1993), the National Strategy for Prevention and Response to Sexual and Gender-Based Violence (SGBV) (2017-2019), and the National Strategy on Harmful Traditional Practices against Women and Children in Ethiopia (2013),¹⁹¹ such as female genital mutilation (FGM), child and forced marriages, and abduction.¹⁹² FGM was prohibited in Ethiopia's criminal code in 2004.¹⁹³ In 2000, under the new Federal Family Code, the minimum age of marriage was raised from 15 to 18 years.¹⁹⁴ The Code

also abolished the conferring of marital power on the husband as the head of the household and introduced mutual consent of spouses as an additional ground for divorce.¹⁹⁵ Furthermore, the Ethiopian penal code criminalises domestic violence and harmful traditional practices, including early marriage, abduction and FGM.¹⁹⁶ However, there remain policy gaps with only 41.7% of prescribed best practice legal frameworks that promote, enforce and monitor gender equality in place.¹⁹⁷

In line with its commitment to the Beijing Plan of Action, the Women's Affairs Office (WAO), launched a National Action Plan for Gender Equality (NAP-GE) 2006-2010 to promote gender-equitable development.¹⁹⁸ The plan aimed to work in cross-cutting areas including: poverty alleviation; education and training of women and girls; advancing women's reproductive rights and health; addressing HIV/AIDS and gender-based violence; and tackling structural/normative barriers associated with women's economic empowerment.¹⁹⁹

The main state actor working on women's empowerment at the federal level is the former Ministry of Women, Children and Youth Affairs (MOWCYA) - now the Ministry of Women and Social Affairs (MOWSA). MOWSA is now mandated to coordinate, design

¹⁸⁹Federal Democratic Republic of Ethiopia (1995) ¹⁹⁰UN (n.d.) ¹⁹¹Ministry of Women, Children and Youth Affairs (MOWCYA) (2013)

¹⁹²Ministry of Women, Children and Youth Affairs (MOWCYA) (2013) ¹⁹³UNICEF (2020) ¹⁹⁴Federal Negarit Gazette (2000)

¹⁹⁵Africa for Women's Rights (n.d.) ¹⁹⁶Africa for Women's Rights (n.d.) ¹⁹⁷UN Women (2021) ¹⁹⁸Ministry of Women's Affairs (2006)

¹⁹⁹Ministry of Women's Affairs (2006)

and implement programmes that enable women to contribute towards and benefit from domestic development.²⁰⁰ At the regional level, Ethiopia has regionalised Women's Affairs Officers, with different levels of administrative and financial resources. Members of the cabinet include representation from the federal MOWSA, the heads of regional Women, Children and Youth Affairs Bureaus, and the heads of *woreda* (i.e. district) offices of Women, Children and Youth Affairs Bureaus at different levels.²⁰¹ Different bureaus - education, health, tourism, labour and social affairs, trade and industry among others - work to design and implement women-orientated policy measures.²⁰² The Addis Ababa City Administration for Women, Children and Youth Office maintains a channel to hear complaints and protect women.²⁰³

Gender-informed policymaking in the Ethiopian context is reinforced by gender-responsive budgeting across education, agriculture, and social protection measures.²⁰⁴ The agenda on gender-responsive budgeting (GRB) is being led by MOWSA and the Ministry of Finance (MOF).²⁰⁵ The mandate and guidelines for gender-responsive approaches have been in place since 2008, developed with support from UNICEF and the British Council. Since 2012, there has been a concerted effort to

build awareness among MOF planners and economists on targeted GRB initiatives.²⁰⁶ All government and policy institutions are mandated to address women's issues in policies, laws and development programming.²⁰⁷ In addition to supporting capacity building on gender-responsive public financial management systems,²⁰⁸ UN Women developed a national-level budget tracking tool in collaboration with the Ministry of Finance to support planning, allocating, auditing and monitoring of budgets from a gender perspective.²⁰⁹ However, while some progress has been made with respect to integrating GRB strategies, especially in the country's Growth and Transformation Plan (GTP), they are yet to be fully institutionalised.²¹⁰

4.1.2 Policy environment

Ethiopia's latest National Development Plan 2021-2030, which replaces the latest Growth and Transformation Plan, includes equitable participation of women (and children) as a key pillar towards achieving ambitious targets towards national prosperity. The plan highlights in particular women's asset ownership, and access to and participation in education, as well as the importance of women in leadership positions.²¹¹ The former GTP I and II emphasise women's equal political participation and specify legislative and policy provisions to enable this.²¹² The last

²⁰⁰Includovate (2020) ²⁰¹Taye et al. (2021) ²⁰²Women Watch (n.d.) ²⁰³Women, Children and Youth Affairs Office. <http://www.addisababa.gov.et/el/web/guest/-/complain-3> ²⁰⁴Includovate (2020) ²⁰⁵Taye et al. (2021) ²⁰⁶Taye et al. (2021) ²⁰⁷Includovate (2020) ²⁰⁸Kimote, J. & Tessema, R. (2021) for UN Women ²⁰⁹Information from Pathways Study Reviewer/Expert; UN Women Ethiopia (2018) ²¹⁰Taye et al. (2021) ²¹¹See <https://europa.eu/capacity4dev/file/109230/download?token=rxippQKh> ²¹²IMF 2018

GTP articulated an ambitious agenda to promote women's economic empowerment, such as raising the number of women-owned SMEs to over four million by 2020. However, few economic growth targets are disaggregated by gender.²¹³

In 2004, a new labour proclamation 377/2003 was introduced by the Ethiopian government, which clearly labels discrimination against women as unlawful.²¹⁴ In a revision in 2011, the country approved a new legal framework regarding social security for government and private sector employees.²¹⁵ Benefits for women include 120 days of paid maternity leave.²¹⁶ In the 2019 Labour Proclamation No. 1156 (which became effective from 15 September 2019) to replace labour proclamation 377/2003, clear guidelines were introduced to curb workplace sexual harassment and sexual violence,²¹⁷ and address minimum wage concerns through a Wage Board. In addition to women's maternity leave, the law also introduced paternity leave for three consecutive days for male workers.²¹⁸ As a result of policy reforms giving women the right to work outside the home, there has been an increase in women's labour force participation, mostly in the informal sector.²¹⁹ The Federal Civil Servants Proclamation No. 1064/2017 provides for and directs government institutions to establish

nurseries where female civil servants can breastfeed and take care of their babies; it also provides 10 working days paternity leave for male civil servants.

As a part of its strategy to strengthen accountability on mainstreaming gender, the government has issued a proclamation (No. 1097/2018)²²⁰ requiring all government ministries to address women's issues in policies, laws and development programmes and projects²²¹, through the established Women and Social Affairs Departments (with a mandate to mainstream gender in their respective ministries). The proclamation further specifies over 20 duties of MOWCYA (now MOWSA) including the responsibility to develop a national plan to ensure that women can participate in economic, political and economic spheres, design and implement VAWG prevention and response activities, establishing funds to create job opportunities for women, and activities to improve women's savings, use of alternative energy sources and technology. Furthermore, Ethiopia's lower parliamentary house - House of People's Representatives (HPR) has a Standing Committee for Women Affairs with a mandate to check and ensure that laws, policies and proclamations are gender sensitive/responsive before they come into effect at national level.²²²

²¹³The Second Growth and Transformation Plan (GTP II) Midterm Review Report ²¹⁴Federal Government of Ethiopia (2004)

²¹⁵Federal Government of Ethiopia (2011) ²¹⁶Federal Government of Ethiopia (2019) ²¹⁷Includovate (2020) ²¹⁸Global People Strategist (2020) ²¹⁹Hyland et al. (2019) ²²⁰Includovate (2020) ²²¹Includovate (2020) ²²²UN - Women Watch (n.d.)

The supportive Women’s Development and Change Strategy (2017) targets elimination of gender-based violence through the introduction of programmes that provide protection and necessary services to survivors - for example, legal aid and women’s shelters.²²³ The Gender Mainstreaming guidelines (2011) were introduced by MOWCYA to guide ministries in producing sector-specific gender measures and plans and to better track/report on budgets allocated towards these measures and plans.²²⁴

Ethiopia’s Productive Safety Net Programme (currently in its fifth phase) targets those who are food insecure and provides unconditional and conditional cash transfers in exchange for public works. The programme has had some positive impacts on empowerment, nutrition and economic outcomes for women beneficiaries.²²⁵ The complementary Urban Productive Safety Net Program (2016)²²⁶ has included important components for women’s workplace rights including - childcare time-flexibility, leave of up to one year for lactating mothers, and mobile childcare centres.²²⁷

The 13-year Industrial Strategic Plan (2013-2025) seeks to increase employment opportunities for Ethiopians.²²⁸ The strategy prioritises labour-intensive, women-

dominated sectors, ushering more women into full-time paid jobs. It aims to bring more women not only into low-skilled jobs but also medium and high-skilled ones.²²⁹ To promote pastoral and semi-pastoral growth, the 15-year Women’s Development and Change Strategy prioritises equality and active participation of women in savings and credit services, improved production schemes in agriculture and animal husbandry, and infrastructural development.²³⁰

Also, Ethiopia has adopted a localized approach that could foster opportunities for women-owned businesses through its public procurement system. The country’s procurement strategy focuses on locally-produced goods and SMEs,²³¹ though women still face competition as there are no direct provisions (e.g. quotas) for gender equality in public procurement policies and practices.²³²

Even with this broadly supportive policy environment, implementation gaps remain as activities are not well integrated and balanced across political, economic and social spheres. These gaps affecting the effectiveness of policies to contribute to women’s economic empowerment include a historic lack of political will and suppression of the budding women’s movement, ineffective coordination across agencies and service sectors, a lack of data and

²²³Includovate (2020) ²²⁴Includovate (2020) ²²⁵Melaku (2010); Irenso & Atomsa (2018); Oxfam, IDRC, IDS (2016) ²²⁶World Bank (n.d.a) ²²⁷Includovate (2020) ²²⁸UNIDO (2017) ²²⁹UNIDO (2017) ²³⁰Includovate (2020) ²³¹A World Bank study reported that in Ethiopia, female majority owned firms constitute ~16% of businesses with up to 10 employees and constitute slightly over 20% of firms with 101-500 employees. See: Alliance for a Green Revolution in Africa (AGRA) 2021 Synthesis Report: Value4Her. <https://agra.org/wp-content/uploads/2021/07/11-Value4HerEthiopia.pdf> ²³²IDRC (2023a); IDRC (2023b)

studies on policy effectiveness, inadequate addressing of gender norms and insufficiently inclusive policy development processes.²³³

Furthermore, customary laws continue to affect the business environment in ways which discriminate against women both directly and indirectly. Regarding land, formal state laws (including the Ethiopian Constitution Article 35 No. 7²³⁴ and Revised Family Code (2000)) assert that women have equal rights to men regarding land use and access. Still, there is a significant disparity between what formal laws state and what is being practised on the ground.²³⁵ Despite clear policy commitments towards enabling women's property and land rights, customary laws continue to deny women's right to own and control rural land.²³⁶ Weak land rights in turn limit women's ability to secure loans needed to start and grow their businesses, while customary marriage and related practices directly restrict women's autonomy and agency to establish or register businesses, lease premises, or sign other contracts in their own right.²³⁷ Furthermore, women's access to formal justice is limited in some (mostly rural) parts of the country, and in most contexts, women are excluded from participating in councils of elders, limiting their access to free and fair hearings in the traditional court system.²³⁸

4.2 Normative factors

4.2.1 Norms around paid and unpaid labour

Women's economic participation in Ethiopia remains stifled due to the burden of unpaid care, unpaid work and domestic labour. Women and girls over the age of 10 spend 19.3% of their time undertaking unpaid care and domestic work compared to 6.6% spent by their male counterparts.²³⁹ Women also work more hours and are twice as likely to spend time collecting water and firewood (71% and 54%, respectively) compared to men (29% and 28%, respectively).²⁴⁰ Women spend more than seven hours a day undertaking these activities.²⁴¹ Women's domestic and care burden also evolves throughout their life course, especially as wives and mothers. Marriage increases women's time allocated towards routine housework by 24 minutes. In contrast, married men's time spent on unpaid care work decreases by nine minutes.²⁴² On average, women spend more than an hour longer per day on combined unpaid and paid work compared to men. Consequently, they have less time for personal care including sleeping and leisure activities.²⁴³ This gender inequality in the division of household labour starts as early as when children are 10 years old, where girls spend 44 minutes on unpaid care work compared to 24 minutes for boys.²⁴⁴

²³³Includovate (2020) ²³⁴This constitutional provision states: "Women have the right to acquire, administer, control, use and transfer property. In particular, they have equal rights with men with respect to use, transfer, administration and control of land. They shall also enjoy equal treatment in the inheritance of property." ²³⁵Carleton (2021) ²³⁶Tura (2014) ²³⁷Nesbitt - Ahmed, Z, MacLean, L (2017) ²³⁸US Bureau of Democracy, Human Rights and Labor (2021) ²³⁹Ferrant and Thim (2019) ²⁴⁰Oxfam (2020); Ferrant et al. (2014) ²⁴¹Suárez Robles (2010) in Ferrant et al. (2014) ²⁴²Ferrant and Thim (2019) ²⁴³Ferrant et al. (2014) ²⁴⁴Ferrant et al. (2014)

Over half of the women engaged in the agriculture sector receive no wages due to norms around women's work being perceived as an extension of their household responsibilities.²⁴⁵ Similar trends can be observed in other small-scale manufacturing industries (such as food processing), where nearly 58% of female workers were not being remunerated for their labour.²⁴⁶

"In farmers' cooperatives, women do most of the work: plant care, fermentation, warehousing. Women do this to support their family but their husbands collect the money from them. Men are not interested in such jobs as culture says it's women's work. [However] women don't benefit [from this] as they are paid low wages and can only live day to day."

Source: General Manager, Private Coffee Export Company, (Pathways Study Interview)

As a policy response to the challenges associated with women's unpaid work, the government introduced the Ethiopian Women Development and Change Packages (2006, 2017),²⁴⁷ which focus on increasing access to electricity and potable water to reduce time spent on fetching water.²⁴⁸ The Ethiopian government also conducted the first

time-use survey in 2013, and has committed to rolling out a national time-use survey focusing on women's unpaid care and domestic work to inform public services planning, budgeting and implementation efforts.²⁴⁹

Employment segregation

Women contribute across the agriculture value chain but tend to be responsible for more time-consuming and laborious activities with limited technical and material/financial support for these activities. As a part of the agricultural value chain, women play a pivotal role in seedbed preparation, harvesting of crops, weeding, transporting and storage preparation.²⁵⁰

A study of coffee farming households in two districts of the Jimma zone of Oromia National Regional State found that women and girls are as likely as men to participate in fertiliser application and weeding, and are more likely than men to participate in livestock production (48% of women and 19% of girls, compared to 17% of men and 15% of boys).²⁵¹ They are also responsible for supportive activities such as taking care of small livestock, and non-farm income activities such as petty trading and leatherwork.²⁵²

In science, technology, engineering and mathematics (STEM) fields, self-selecting biases foster gender-based segregation in the labour force.²⁵³ Furthermore, associated

²⁴⁵UN Women (2014) ²⁴⁶UN Women (2014) ²⁴⁷The Ethiopian Herald (2007) ²⁴⁸Includovate (2020) ²⁴⁹Oxfam (2020) ²⁵⁰Belete (2019) ²⁵¹Kemal, Emana and Shumeta (2019) ²⁵²Belete (2019) ²⁵³OECD (2021)

learning materials may also perpetuate problematic stereotypes, resulting in women acquiring different skills, not because of their capacity but due to deeply pervasive and entrenched biases. This also limits women's ability to join fast-growing economic sectors and access well-paying jobs.²⁵⁴ As a response to this issue, Ethiopia Electric Utility (EEU) has introduced scholarships and internships to women in STEM fields, and new policies against sexual harassment and gender-based violence. The goal is to employ 30% women by 2023 in the traditionally male-dominated electricity sector, particularly prioritising renewable energy jobs.²⁵⁵

Very few managerial positions in the country's public sector are filled by women.

Only 26.5% of the women are managers by occupation but continue to form the majority of clerical and support workers at 65%.²⁵⁶ A key challenge associated with women's underrepresentation in top-level roles is the impact of cultural gender norms on women.

“Women are preferred until they become pregnant. But I genuinely don't want to hire a woman that's pregnant because I don't want to pay her while she is staying at home.”

Source: Staff, Government Institute, (Pathways Study Interview)

Furthermore, qualitative insights for the Pathways Study highlight gender-related workplace discrimination. Biases particularly include hiring women who are of reproductive age. Pathways Study interviewees also highlighted a general “lack of awareness” of employment law by those involved in hiring processes in the private sector.

4.2.2 Voice, representation and leadership in decision making

At the executive level, there is high female political representation in recent years, with a female Head of State and a gender-balanced cabinet.²⁵⁷ This is primarily due to women being “appointed”, rather than elected to these positions. In terms of the representation of women in parliament, the situation is more complex. There are no quotas in place,²⁵⁸ and female MPs report numerous barriers to their political careers. Barriers include male politicians' unfavourable attitudes towards women political leaders.²⁵⁹ Women's representation in the Federal Parliament (the House of Peoples' Representatives - HPR) has shown a significant increase from 27.9% in 2010 to 38.8% in 2015,²⁶⁰ and to 41.3% in 2021.²⁶¹ The strong female representation in Ethiopia's parliament suggests that Ethiopia's political culture at the national level, accepts women in decision-making positions.

²⁵⁴OECD (2021) ²⁵⁵World Resources Institute (2021) ²⁵⁶Terefe et al. (2019); Central Statistical Agency (2013) ²⁵⁷Allo (2018)

²⁵⁸The International Institute for Democracy and Electoral Assistance (IDEA) (n.d.) ²⁵⁹Dessie (2021) ²⁶⁰Kassahun, M. & Kidane, B. (2020)

²⁶¹IPU Parline (n.d.b)

At the sub-national level, however, women's political representation remains low. The sub-national average share of women in government is 26.9% and progressively decreases from the *woreda* (district) level (29.5%) to zonal (22.8%) and regional state levels (21.9%).²⁶² At times, women are only included on women's affairs committees in regional councils, with all other positions held by men.²⁶³ Similarly, women are also less represented in informal customary structures; for example, women are most often not represented in councils of elders.²⁶⁴ Barriers to women's political participation include socio-cultural issues and discriminatory gender norms, religious factors, family commitments/time constraints as well as election-related gender-based violence.²⁶⁵

Still, women notably hold key positions in decision making in some communities such as in the Oromia Region: the Gada²⁶⁶ (also spelt "Gadaa") system provides for women to have their own roles in all affairs of the Oromo society, e.g. through institutions such as Siiqqee and other ceremonies where women are actively involved and empowered to protect women's rights.²⁶⁷ Women's interests were incorporated in the Gada system through five fundamental pillars: (i) liberating the law (rule of law); (ii) people's economic progress; (iii) transforming social structure to an advanced level; (iv) political leadership; and (v) the Waaqeffannaa religion.²⁶⁸

Recent governance reforms and initiatives present opportunities to increase women's political participation. For example, the appointment of women as heads of key state institutions such as the Ethiopian National Election Board as well as increased participation of women in the Cabinet.²⁶⁹ Furthermore, in the lead up to the 6th General Election, UN Women and the Network of Ethiopian Women's Associations (NEWA), have been providing capacity-building training on political leadership and campaigning to 381 women candidates running for Federal Parliament and Regional Council levels.²⁷⁰

Intra-household decision making

Women's decision-making capacity within most Ethiopian households impacts their access to economic opportunities while also impacting other human development indicators. The most recent Ethiopian Demographic Health Survey (DHS) reports that only 11-18% of women were involved in any decision making²⁷¹ alone and 66-68% together with their husbands or partners.²⁷² Overall, 71% of women participate in all decisions and only 10% are not involved in any decision making. While these figures are relatively high (compared to other SSA countries), disparities exist when education level and wealth are considered: 87% of women with more than secondary education participate in all decision making versus 68% of women without any education. Likewise,

²⁶²Kassahun, M. & Kidane, B. (2020) ²⁶³Mercy Fekadu et al. (2020) ²⁶⁴US Bureau of Democracy, Human Rights and Labor (2021)

²⁶⁵Kassa, 2015 as cited in Richards, R. (2020) ²⁶⁶"Gada is a traditional system of governance used by the Oromo people in Ethiopia developed from knowledge gained by community experience over generations". See: UNESCO (n.d.) ²⁶⁷Sefera, A. E. (2019)

²⁶⁸Muluken, K. A. and Center for the Advancement of Rights and Democracy (CARD) (2021) ²⁶⁹Hertling, 2020 as cited in Richards, R. (2020) ²⁷⁰UN Women Africa (2021) ²⁷¹This included three categories of decisions: (i) the woman's own health care; (ii) major household purchases; and (iii) visits to their family or relatives. ²⁷²Ethiopia Demographic and Health Survey (2016)

80% of women in the highest wealth quintile participate in all decision making versus 65% of women in the lowest wealth quintile.²⁷³ Factors limiting women's decision making include limited information about earning potential, barriers to women crossing over to work traditionally considered to be men's work and entrepreneurial ventures, and limited availability of labour-saving technologies to reduce the need for/burden of unpaid work.²⁷⁴

4.2.3 Women's freedom of mobility

Restrictions around women's mobility limit income-earning opportunities in many sectors. A study conducted on transport and mobility attributed women's low income and economic opportunities to lower access to motorised transportation.²⁷⁵ As noted in a qualitative interview with a flower processing private sector organisation, many worksites are located far from women's homes, especially in cattle, flower, food processing, textile and construction sub-sectors. This poses multiple challenges for women, including limited transportation options, vulnerability to sexual harassment or other forms of gender-based violence, a lack of childcare and an inability to return home in time to complete their unpaid domestic, care, or subsistence farm work.

Norms around women's mobility and rigid gender roles limit economic opportunities outside of the home and access to markets. Social expectations force married women

to remain close to home. While women in female-headed households can retain control over decision making and income expenditure to a greater extent than those in male-headed households, they face challenges and restrictions related to reaching distant markets.²⁷⁶

"...most married women refuse to go to sites found in remote areas. For example, when we shift from one project site to another project site found in another city most women refuse to go unless they are single. But most men go, whether they are married or not."

Source: HR Representative, Private Company (Pathways Study Interview for Construction Sector)

4.2.4 Violence against women and girls

Women face myriad threats to their health and safety in both their personal and occupational lives in Ethiopia. Concerns include gender-based violence including sexual harassment, reputational risks from working in certain environments or roles, and inaccessible work locations far from their homes. From intimate partner violence (IPV) to widespread sexual assault of girls and women, to regional instability and violence, to occupational hazards at worksites, both real and perceived

²⁷³Ethiopia Demographic and Health Survey (2016) ²⁷⁴World Bank (2019b) ²⁷⁵Bryceson et al. (2008); In Abhishek et al. (2019)

²⁷⁶Gender Equality Strategy for Ethiopia's Agriculture Sector (2017)

health and safety risks prevent women from engaging fully in economic opportunities.

Gender-based violence remains widespread, severely limiting women's rights and wellbeing.

According to a systematic review of 10 studies conducted on domestic violence and associated factors in Ethiopia, lifetime prevalence of domestic violence against women by husband or intimate partner ranged from 20% to 78%.²⁷⁷ Gender-based violence is driven and sustained by norms around the acceptability of violence; about 88% of rural and 69% urban women believe that their husbands have the right to physically beat them.²⁷⁸ This is higher among women living in poverty and those who have limited access to economic opportunities.²⁷⁹ Furthermore, in the SSA context at large, high levels of unemployment and a lack of supportive socioeconomic safety nets often prevents women from leaving abusive and violent relationships.²⁸⁰

Gender-based violence and harassment are common during the recruitment and career promotion process. Pathways Study interviewees highlighted sexual harassment as a key factor preventing women from developing in their careers. A 2020 systematic review and meta-analysis highlights the scale of the problem with prevalence of sexual violence and sexual harassment in Ethiopian workplaces estimated to be extremely high;

estimated pooled prevalence of workplace sexual violence is 22%, with pooled prevalence of sexual harassment is 33%, and attempted rape 14%.²⁸¹ Prevalence of workplace sexual violence was highest among female university staff members (49%) and commercial sex workers (28%).²⁸²

Established customary laws and traditions deny women inheritance and exclusive rights to land ownership.

Women often find themselves involved in disputes and arguments, which can escalate to other forms of violence, particularly disadvantaged poor and vulnerable women.²⁸³ Some of the common types of land rights violations and disputes experienced by women include: (i) border encroachment; (ii) taking over or illegal occupation of land; and (iii) transactional or unauthorised transfer of land rights through sale, gift or rent.²⁸⁴

4.3 Individual factors

Women entrepreneurs typically have less access to finance, land and networking opportunities, despite the sizeable contribution of their micro and small enterprises to job creation and poverty alleviation. Individual-level factors, including human, social and economic capital, influence women's economic opportunities and outcomes, as well as their exposure and resilience to economic and environmental shocks.

²⁷⁷Semahegn (2015) ²⁷⁸Central Statistical Agency (2012) ²⁷⁹Semahegn (2015) ²⁸⁰Pathfinder International (2016) ²⁸¹Worke et al. (2020) ²⁸²Worke et al. (2020) ²⁸³Mekonen et al. (2020) ²⁸⁴Mekonen et al. (2020)

4.3.1 Human capital

Inequalities in education continue to affect women's economic opportunities in Ethiopia. As detailed in section 3.2, women continue to face significant inequalities in access to education, with factors contributing to girls' lower education status including cultural norms, quality of education, poor enabling environments in school, lack of gender-responsive pedagogies, distance and mobility, and gender-based violence.²⁸⁵ Gaps in education status have widened due to the COVID-19 pandemic and internal conflicts/violence, including limited access to distance learning initiatives and uncertainties associated with returning to schools, preventing them from continuing their studies.²⁸⁶ High child marriage rates, unmet safety and sanitation needs of girls, and corporal punishments/abuse from authorities and peers further impede girls' chances of completing school.²⁸⁷

Women's low educational status poses additional challenges for them to get jobs in skilled or managerial positions. Along with normative barriers, women's low educational status restricts women to take on low-status and low paying jobs in the informal sector with lower earnings and security or ones that employ them within household farmlands and/or businesses.²⁸⁸ Only 4.5% of private sector corporations had women in top management.²⁸⁹ Additional

factors, including location and women's age, further limit opportunities.²⁹⁰

A World Bank study assessing the gender gap in agricultural productivity in Ethiopia found that female farm managers produced 36% less per hectare than their male counterparts due to four reasons: (i) women spend less time on business activities than men (for reasons including the responsibility for domestic work); (ii) women hire less labour than men due to having limited entrepreneurial training; (iii) women are less likely to have a business licence; and (iv) women access formal credit less than men due to access limitations (i.e. not meeting lending requirements).²⁹¹ While investment is needed to bridge this gap, potential economic gains from reducing the gender gap translate into poverty reduction and exceed the resources needed to close the gap.²⁹²

Women are also limited by the gender gap in digital literacy and the use and uptake of technology. Women are less likely to use and access the internet due to a lack of knowledge and intimidation. They are also less likely to buy their own phone/sim.²⁹³ For example, women are 38% less likely (50% in rural areas) to use interpersonal messaging services than men.²⁹⁴ Overall, there is limited country data and research available on statistics associated with women's digital access, behaviours and use.

²⁸⁵USAID (2018) ²⁸⁶Malala Fund (2020) ²⁸⁷UNICEF (2018a) ²⁸⁸Ferrant (2014) ²⁸⁹Tamrat (2020) ²⁹⁰World Bank (2009)

²⁹¹International Bank for Reconstruction and Development (IBRD)/World Bank (2019) ²⁹²Ethiopia's Ministry of Agriculture and Natural Resources, UN Women, UNDP and UN Environment (2018) ²⁹³Amde (2011) ²⁹⁴GSMA (2016)

Women entrepreneurs are restricted by lack of business skills and access to information. More than half of female entrepreneurs in Ethiopia face challenges in licensing, establishing, operating, or expanding new or existing businesses.²⁹⁵ These challenges are more pronounced in small-scale manufacturing - a focal area for Ethiopia's industrialisation and economic diversification ambitions - where women are burdened by low educational attainment at the secondary and tertiary levels, limited human and financial capital, and unpaid care and domestic work.²⁹⁶ There is also limited understanding among women of bureaucratic processes due to lack of education and domestic care responsibilities.²⁹⁷ Nearly 74% of women lack access to print, television, or radio.²⁹⁸

Recent literature on women's economic empowerment is increasingly recognising the importance of mindset training among women to enhance entrepreneurial capacity.²⁹⁹ These include enhancing women's entrepreneurial aspiration, self-esteem, goal setting and communication. A study evaluating two business training programmes in Ethiopia demonstrated that psychological skills training as a part of TVET initiatives, are important for women's businesses to succeed.³⁰⁰ Evidence further suggests that a positive business mindset can be better inspired by trainers who are also business owners themselves. While the overall results were mixed, the

study acknowledged the merits of introducing psychological skills training as a part of service delivery approaches.³⁰¹

4.3.2 Social capital

Single women, widowed women and elderly women who represent a disproportionate majority of poor households, have limited access to vertical social capital.³⁰² Women's access to social capital is constrained by traditional gender norms confining women's role in the family and community. This means that while they may have better access to horizontal social capital through connections with kin, friends and neighbours within their community, men have better access to vertical social capital - coming from their ability to network both within and outside of their local community.³⁰³

Women's lower social capital may hinder their access to social safety net programmes aimed at improving economic capital. In an ethnographic study conducted with 30 households, women accounted for less than 10% of the beneficiaries of the Productive Safety Net Programme (PSNP). Women's limited access was attributed to women's limited vertical networks and direct access to targeting agencies. Furthermore, women feel hesitant and are less likely to make successful appeals as beneficiaries in public/community level forums.³⁰⁴

²⁹⁵Beriso (2021) ²⁹⁶Beriso (2021) ²⁹⁷Endris et al. (2020); Bhalla et al. (2021) ²⁹⁸Central Statistical Agency (2017); Ethiopia Demographic and Health Survey (2016) ²⁹⁹Campos et al. (2017); Chang, W., Diaz-Martin, L., Goplan, A., Guarnieri, E., Jayachandran, S., Walsh, C. (2020) ³⁰⁰Alibhai et al. in World Bank (2019b) ³⁰¹Alibhai et al. in World Bank (2019b) ³⁰²Kebede (2018) ³⁰³Endris et al. (2020)

Cooperatives and village savings and loan associations (VSLAs), present opportunities to build women’s social capital. A 2021 report from the Federal Cooperative Agency (FCA) indicated that of 92,755+ cooperatives in Ethiopia with 21+ million members, 32% were female while 68% were male.³⁰⁵ The same report confirmed that the 21,328 primary SACCOs with ~5.4 million had 60% female and 40% male members.³⁰⁶

“Initially, we found women-only groups, but later on they were forced to become mixed because this was the default (system)...with female only groups, there was this stigma and people were really scared to join even if they were doing really good things. Husbands don’t want women to join those groups. So they are more open to participating in mixed groups because when they are mixed, they have more access to resources, members, networks, connection etc. They can go to woredas (districts) and other offices. They can convince to get fertiliser... these types of logistical services are provided for men, but it is a challenge for women-only groups.”

Source: Gender Consultant, Private Company (Pathways Study Interview)

However, women’s participation in some sectoral cooperatives is limited, with one study of 73 coffee cooperatives finding that women constituted only 20% of cooperatives’ membership.³⁰⁷ While women’s participation in cooperatives is generally increasing,³⁰⁸ women continue to face barriers to accessing cooperatives and other forms of collective action due to inequitable intra-household dynamics, gender norms, as well as women’s low access to land.³⁰⁹ Women with more human and economic capital (education and wealth) participate more, but they are less likely to participate overall (and to occupy decision-making positions in cooperatives) due to normative barriers.³¹⁰ Also, due to inequitable intra-household dynamics, a Pathways Study interviewee highlighted the challenges of sustaining women’s membership in women-only cooperatives as they faced gendered barriers that mixed cooperatives did not have to deal with (see interview quote in text box).

Village savings and loan associations (VSLAs)³¹¹ have been critical in helping women build their financial skills, gain access to and control over resources, and generate economic opportunities.³¹²

In Ethiopia, women’s VSLAs supported by different development organisations (e.g. CARE and MEDA) have been able to

³⁰⁴Endris et al. (2020) ³⁰⁵International Cooperative Alliance Africa (ICA Africa) 2021; Federal Cooperative Agency (FCA) n.d. National Cooperative Societies Information. <http://fca.gov.et/> ³⁰⁶International Cooperative Alliance Africa (ICA Africa) 2021; Federal Cooperative Agency (FCA) n.d. National Cooperative Societies Information. <http://fca.gov.et/> ³⁰⁷UN Women (2018); Giving Compass (2018) ³⁰⁸A 2021 report from the Federal Cooperative Agency (FCA) indicated that of 92,755+ cooperatives in Ethiopia with 21+ million members, 32% were female while 68% were male. See: International Cooperative Alliance Africa (ICA Africa) 2021; Federal Cooperative Agency (FCA) n.d. National Cooperative Societies Information. <http://fca.gov.et/> ³⁰⁹Woldu et al. (2015) ³¹⁰Various sources in Woldu et al. (2015) ³¹¹Usually a self-managed group of 20-30 individuals. ³¹²Women Connect (n.d.)

achieve some successes associated with building resilient livelihoods,³¹³ unlocking entrepreneurial potential³¹⁴ and strengthening financial capabilities among women.³¹⁵ For example, as a part of a CARE-supported initiative, younger girls associated with VSLAs were taught to generate income by engaging in small business opportunities such as goat and sheep rearing, poultry farming, vegetable trading and *khat*³¹⁶ packaging/collecting.³¹⁷ With a strong focus on building social capital as well as skills including financial literacy, these programmes support women and girls to improve their access to financial services and to engage in markets.

In Ethiopia, women have access to some other social capital systems/networks e.g. *iddirs* which are traditional supportive associations for mutual benefit and with voluntary membership; found in both in rural and urban areas, they are usually formed by people with common ties (e.g. neighbours, co-workers) to provide aid/support in specific (sometimes emergency) situations,³¹⁸ and thus also described as “an informal insurance arrangement”.³¹⁹ Women-led *iddirs* have been successful across various areas including healthcare, e.g. in supporting tuberculosis preventive treatment (TPT) initiation and completion for children.³²⁰ Given their high potential to foster women’s economic empowerment, *iddirs* are well researched,

including a study that has chronicled previous research on *iddirs* from 1958 to 2019.³²¹

4.3.3 Economic capital

Financial assets

There is a widening gender gap in access to formal financial and banking services, with women accounting for a disproportionate share of the unbanked.³²² Most recent available figures indicate that the gender gap in access to formal financial and banking services is wide: 12% in 2017, from an almost insignificant gender gap in 2014.³²³ Wider social constraints, discriminatory perceptions about women borrowers, intra-household dynamics and lack of negotiation skills, and social status limit their financial inclusion.³²⁴ Women entrepreneurs face challenges while trying to move from collective savings/lending (such as within VSLAs) to more formal individual lending.³²⁵ Women also face barriers in absorbing the financial cost associated with accessing formal financial services. Additionally, women are less likely to own and control physical assets that serve as collateral (as discussed further below).³²⁶

Various factors influence women’s behaviour associated with savings. In addition to women’s employment, income and educational attainment, factors such as family access to credit, family size and participation in urban agriculture also

³¹³MEDA (2019) ³¹⁴MEDA (2019) ³¹⁵MEDA (2019) ³¹⁶An amphetamine-like leaf which is a popular (legal) stimulant drug, an increasing source of livelihoods and major cash crop in Ethiopia and many neighbouring countries. ³¹⁷Care Ethiopia (2020) ³¹⁸Léonard, T. (2013) ³¹⁹Aredo, D. (2010) ³²⁰Jerene, D., Assefa, D., Tesfaye, K., Bayu, S., Seid, S., Abera, F., Bedru, A., Khan, A., & Creswell, J. (2022) ³²¹Amsalu, D., Bisailon, L., & Tiruneh, Y. (2020) ³²²World Bank (2018b) ³²³World Bank (2018b) ³²⁴Lakew and Azadi (2020) ³²⁵Lakew and Azadi (2020) ³²⁶World Bank (2019)

influence women's saving behaviour. A study with a sample size of 50 found that urban agriculture and income have a significant positive effect on women's savings. At the same time access to credit and family size negatively and significantly influence women's savings.³²⁷

"...lack of finance is preventing [women] from [becoming] entrepreneurs. Since their salary is very low, they are not able to save to start their own business. Some employers don't increase salary because they think that their employee has no place to go, so they just add more responsibilities without increasing salary."

Source: Manager, Private Company (Pathways Study Interview for Garments and Textiles Sector)

Productive assets

Women, especially married women, face unequal access to and control over key productive assets. This includes land ownership, financing, agricultural technologies and formal agricultural extension services.³²⁸ However, some attempts have been made to introduce policies favouring joint land ownership to drive equitable division of household assets, and enabling women to claim land rights upon divorce, death or separation.³²⁹

Over 50% of women do not have joint or sole ownership of a house, while 60% do not own land. Furthermore, of those women who own land, only half report having their name on the title deed.³³⁰ There is a significant difference in land size: 0.79 hectares for female-headed households and 1.07 hectares for male-headed households.³³¹ In addition, women's plots tend to have poorer soil quality and they have less access to agricultural inputs.³³² Furthermore, women are rarely primary land managers even in female-headed households, due to inequitable gender norms.³³³

Factors limiting women's ability to exercise their right to property and access to/ownership of land include intra-household dynamics that are dominated by older men, as well as women's limited knowledge and awareness of their rights as citizens.³³⁴ Other factors include traditional practices such as husbands inheriting land upon the death of their spouse's parents, legal frameworks around land tenure insecurity for divorced women, limited availability of input resources such as labour, oxen and credit, and unfavourable arrangements around sharecropping.³³⁵

³²⁷Ayene (2014) ³²⁸Woldu et al. (2013) ³²⁹Kumar, and Quisumbing (2012) ³³⁰World Bank (2019d) ³³¹FAO (2019) citing Central Statistics Agency (CSA 2015) ³³²Dereje et al. (2016) in Mas Aparisi (2021) ³³³World Bank (2019d) ³³⁴Tura (2014) ³³⁵Mogues et al. (2009)

Noteworthy is that the Ethiopian government has implemented impactful interventions to support women's economic empowerment related to land; for example, the government-led large-scale land certification programmes (First-Level Land Certification (FLLC) that occurred between 1998 and 2004, and Second-Level Land Certification (SLLC) from 2005) to register land of smallholder farming households in rural areas across the four highland regions: Amhara, Oromia, Southern Nations, Nationalities and Peoples' (SNNP) and Tigray.³³⁶ With 15+ million certificates issued, it is estimated that almost 90% of the certificates from the SLLC have women as individual or joint owners. In addition, SLLC was found to lead to a 10% increase in the likelihood of accessing credit, an 11% increase in landholding and a 44% increase in women's decision making over crops.³³⁷ However, beyond titling, women's access to/use of and control over the land is the true measure of women's economic empowerment.³³⁸

Domestic infrastructure

Women's economic potential is restricted by the disproportionate effect of dependence on biomass energy sources.

Nearly 99% of rural and 80% of urban households use biomass energy sources, and nearly 56% of households have no electricity

access.³³⁹ It is widely recognised that the use of biomass as fuel results in respiratory illnesses and acutely affects women's health in addition to climate-related impacts.³⁴⁰ Moreover, collecting and gathering fuel increases women's daily drudgery and vulnerability to gender-based violence, as women are forced to walk long distances and in remote areas in search of fuel.³⁴¹ Similar difficulties exist for water collection with 52.6% of rural households spending 30 minutes or more to fetch water daily.³⁴²

As a response to the problems associated with biomass fuel consumption, the government of Ethiopia has developed a Mirt (meaning "best" in Amharic) stove programme³⁴³ to reduce environmental problems and save time for cooking.³⁴⁴

However, studies on fuelwood's use and performance remain limited. There are also some private sector and civil society initiatives focusing on the provision of domestic infrastructure. For example, CARE Ethiopia is currently providing "Little Sun" solar lamps to women through a micro-franchising model. The lamps are distributed in partnership with women-operated VSLAs, where members are engaged in the sales of these lamps. In addition to creating economic opportunities, the objective is to switch from toxic fuel-based lighting to solar power.³⁴⁵

³³⁶UN Women Ethiopia (2022) ³³⁷USAID (2016) ³³⁸UN Women Ethiopia (2022) ³³⁹Study Solar (2020) ³⁴⁰Edelstein et al. (2008)

³⁴¹Shankar (2015) ³⁴²Ethiopia Demographic and Health Survey (2016) ³⁴³Kindu Trust (n.d.) ³⁴⁴Mamuye et al. (2018) ³⁴⁵Little Sun (2018)



5. Sector briefs

The following briefs provide an overview of three broad sectors in Ethiopia: (i) Agriculture (coffee, livestock and cut flowers); (ii) Manufacturing (with a particular focus on food processing and garments and textiles industries); and (iii) Construction, via a short piece/spotlight approach. Each sector brief includes an overview of the gendered composition of jobs and the value chain, as well as analysis of barriers and enablers to women's economic empowerment within the sector. Finally, the briefs highlight key opportunities and entry points and sector-specific recommendations for both public and private stakeholders to improve women's economic status within these sectors.

Agriculture Sector Stakeholders (Coffee, Livestock, Cut Flowers)

Region	Stakeholder Type					TOTAL
	Private Company	Association, Collective, Organisation	Co-operative	Government Agency/ Department	NGO/ CSO	
National*	11	9	-	7	6	33
Afar	-	-	-	-	-	-
Amhara	-	-	-	-	-	-
Somali	-	-	-	-	-	-
Oromia	22	-	5	1	-	28
SNNP	1	-	1	-	-	2
Addis Ababa	1	-	1	-	-	2
Sidama	-	-	2	-	-	2
Gambela	-	-	-	-	-	-
Benishangul-Gumuz	-	-	-	-	-	-
Tigray	-	-	-	-	-	-
TOTAL	35	9	9	8	6	67

Note: *National stakeholder tally includes global stakeholders, who are assumed to operate at a national scale.

From the stakeholder mapping exercise for agriculture, 67 stakeholders were identified across the various regions of Ethiopia, operating across the various sectors, namely coffee, livestock and cut flowers. A summary table of stakeholder types across the regions is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed [here](#) on the Pathways Study website.

5.1 The coffee sector

Sector overview



Ethiopia is Eastern Africa's largest producer of Arabica coffee, a cash crop

for millions of rural farmers. Overall, production experienced steady growth in recent years, with forecasts reaching 7.6 million bags or 457,200 million tonnes in 2022.³⁴⁶ Approximately half of this coffee produced is designated for local consumption, while the rest is exported.³⁴⁷ Coffee is the country's largest export, with export revenues of over USD645 million in 2022.³⁴⁸ It is primarily produced in the Oromia Region and Southern Nations, Nationalities, and People's Region (SNNPR), (accounting for 95% of all coffee production),³⁴⁹ and holds a central place in local culture.³⁵⁰

³⁴⁶USDA (2021) ³⁴⁷USDA (2021) ³⁴⁸CIA Factbook (2022); Ethiopian Monitor (2022) ³⁴⁹US Department of Labor (2020)
³⁵⁰Face2Face Africa (n.d.)

The Ethiopian government has enacted various policies supporting growth of the coffee sector. For example, the Growth and Transformation Plan (GTP) II (2015-2020) includes objectives such as increased productivity and production of coffee.³⁵¹ The Coffee Development Strategy, finalised by the Ministry of Agriculture (MOA) and the Ministry of Trade (MOT) to support the GTP II, called for structural reforms, loans, improvement of quality, pruning of old plants and changes in procedures to allow buyers to interact directly with the farmers. Key activities planned included the distribution of seedlings, pruning services, as well as the establishment of extension programmes.³⁵²

Four production systems exist in Ethiopia - forest, semi-forest, gardens and plantations. Smallholders dominate coffee production, with 95% of coffee production through forest (10%), semi-forest (35%) and garden (50%) system production.³⁵³ These forms of production all involve intercropping with a mix of food, fodder and cash crops; coffee is cultivated for own consumption as well as a cash crop (sale of red or dried cherries).³⁵⁴ There are only about 200 large-scale monoculture plantations, and these may be owned by non-farmers, such as exporters or processors.³⁵⁵ Forest planting can be a key strategy for forest conservation and provision of income for forest living people.³⁵⁶

There are two common coffee processing methods: sun-dried and wet processing.

Ethiopian coffee is currently 70-80% unwashed or sun-dried and 20-30% washed. Unwashed coffee earns a lower price in many markets (e.g. the US where consumers prefer the “cleaner” taste of washed coffee). In 2020, an Export Coffee Contract Administration directive was established to fix a minimum coffee exporting price. Ethiopia continues to invest in stringent quality measures and checks (including minimum support pricing) that significantly boost the price of its coffee on global markets; the country exceeded its coffee export target by USD120 million in the first quarter of 2021.³⁵⁷

The Ethiopia Coffee and Tea Authority (ECTA) oversees the coffee sector. In June 2021, the ECTA opened the first Coffee Training Center (CTC) with a view to improving the sustainability and inclusiveness of the value chain through private and public partnership. A number of other actors and stakeholders interact within the coffee value chain including: cooperatives, such as the Sidama Coffee Farmers’ Cooperative Union, Oromia Coffee Farmers’ Cooperative Union Ltd (OCFCU), Yirgacheffe Coffee Farmers’ Cooperative Union Ltd and the Bench Maji Coffee Farmers’ Cooperative Union; private sector exporters, for example Heleph Coffee; global

³⁵¹Federal Democratic Republic of Ethiopia (2016) ³⁵²Abdu (2015) ³⁵³Minten et al., 2019 in Mas Aparisi (2021) ³⁵⁴BASIC 2019 in Mas Aparisi (2021) ³⁵⁵Mas Aparisi (2021) ³⁵⁶Biot (2021) ³⁵⁷Yewondwossen, M. (2021)

roasters and retailers; certification actors such as the Rain Forest Alliance (RFA) coffee, Organic, Fairtrade coffee, etc.; and non-governmental organisations.

Four million households are engaged in small-scale coffee production.³⁵⁸

Smallholder farmers supply cooperatives, although they may also sell directly to traders or export markets. Only farmers who own at least two hectares of land, and commercial farms, are allowed to sell internationally (since 2019). The poorest smallholder farmers are underrepresented in cooperatives,³⁵⁹ as are household members who are not the registered head of household.³⁶⁰ The poorest households,³⁶¹ as well as farmers who live in remote locations or produce small quantities or low-quality coffee, tend to sell throughout the year to mobile traders that provide more flexible financial arrangements and have less quality and volume requirements than cooperatives.³⁶²

As of 2016, there were 2.6 million workers in the coffee sector, 42.1% of whom were women. The share of total employment in the country was 6.6%, while in the coffee growing belts situated across the southern and western regions of Oromia, Gambela and SNNPR, this share rose to 23.5% and 17.8%, respectively. It is estimated that median monthly earnings are approximately USD20

for employees and USD19 for own account workers.³⁶³ Employment in the sector is mainly informal with key presence from local cooperatives, and seasonal with harvest typically taking place between October and December.³⁶⁴

In 2020, the COVID-19 pandemic caused various challenges for Ethiopian coffee farmers, including: labour shortages, soaring transport costs and transport delays;³⁶⁵ lack of finance to hire farm workers to maintain the fields (e.g. weeding, composting); as well as fluctuations in production costs; shifts in market demand; restrictions on social gatherings; and contract cancellations. Overall, 57% of coffee farming households reported a loss of income due to the pandemic.³⁶⁶

Other key challenges facing coffee farmers is climate change, affecting production due to drought, and an increasing range of diseases including Coffee Berry Disease (CBD) as well as the loss of large swarms of insects responsible for pollinating coffee plants. Beyond this, industry experts describe the coffee sector as suffering from a lack of inputs, modern technology, modern extension services, along with overall poor sectoral management. Finally, a challenge faced by the sector is the increased popularity of “*khat*”³⁶⁷ a bushy plant with stimulating properties whose production soared by

³⁵⁸US Department of Labor (2020) ³⁵⁹El Ouaamari (2013) in Mas Aparisi (2021) ³⁶⁰Kemal, Eman and Shumeta (2019) ³⁶¹Aregu, L., Puskur, R., & Bishop Sambrook, C. (2011) ³⁶²Hertz-Adams (2020) in Mas Aparisi (2021) ³⁶³ILO (2020a) ³⁶⁴Pathways Study Interview with Staff of Government Body ³⁶⁵Seneshaw Tamru et al. (2020) ³⁶⁶Technoserve (2020) ³⁶⁷Many Ethiopian farmers are switching from growing coffee to growing khat to boost their income, as typically a farmer would need 10 coffee trees to earn the equivalent amount from just one kilo of khat. See: United States Department of Agriculture (USDA) Foreign Agricultural Service (2021)

220% between 2015 and 2020 and which can provide higher income than coffee, leading farmers to switch crop.³⁶⁸

As coffee is mainly grown in the southern and western regions, the Tigray conflict in the north of the country did not have a direct impact on the coffee sector.

However, the conflict indirectly impacted the coffee sector as cherry collection in Guji zone (Oromia Region) was delayed (in a bid to cut the possible flow of funds to liberation groups), and there was increasing inflation due to this.³⁶⁹

Women's roles in the coffee sector

Women carry out up to 75% of coffee farm work, but only earn 43% of the income from this work;³⁷⁰ other sources report that women earn just 34% of the overall income from coffee production,³⁷¹ and that less than 50% of the women involved in coffee production earn an income.³⁷² When employed in formal employment, women earn a lower wage than men in similar roles. A Pathways Study interviewee explained that the wage gap and the seasonality of coffee work tend to deter women from entering the coffee sector in the first place, although a lack of alternative employment opportunities often forces them to do so.³⁷³ Another Pathways Study interviewee also suggested that because employers think that women are less likely than men to go and look for

alternative opportunities, they pay lower wages to women.³⁷⁴

Women dominate in raising coffee, harvesting and post-harvesting activities, while men dominate in land preparation and marketing of coffee.

Some other farm activities are shared. A survey of 120 coffee farms found that although women and men participate in all production activities, women do more work in raising coffee seedlings and coffee picking. Women also do more of the work in processing activities, such as cleaning and sorting of coffee cherries, and coffee cherry drying and dehulling. In contrast, men are more likely to be involved in land preparation and cultivation, loading/unloading of coffee and marketing activities.³⁷⁵ A study of coffee farming households (215 producers) in two districts of the Jimma zone of Oromia National Regional State also found that women and girls dominate activities such as seedling preparation and transplanting, as well as weeding. Men and boys dominate physical activities such as hoeing, while there is equal participation in other farm activities (collecting, cleaning, drying, hulling and grading/sorting), with some hired labour involved in collecting and hulling coffee cherries.

³⁶⁸DW (2019) ³⁶⁹Furquim (2021) ³⁷⁰Nestlé (2017); TechnoServe (2018) ³⁷¹Syakirah, A. (n.d.) ³⁷²Louis Dreyfus Company LDC (2020)

³⁷³Pathways Study Interview with Staff of Government Body ³⁷⁴Pathways Study Interview with Staff of Government Body ³⁷⁵Gashaw, Habteyesus and Nedjo (2017) in Mas Aparisi (2021)

This study also found that men and boys dominate in the marketing activities of transporting to market and selling coffee;

80% of those who sell coffee are male.³⁷⁶

Women's participation in coffee farm investment, marketing or sales roles is low.³⁷⁷

When women sell coffee, they usually do so in smaller quantities and directly to traders or customers, rather than to cooperatives.³⁷⁸

Women's participation in the coffee value chain is lower in higher value activities.

Women tend to be responsible for sales of lower quality coffee locally. The coffee value chain is dominated by demands for product quality, and international importers define product specification, price and volume, which has a downward effect on smallholder farmers. This leaves a surplus of lower quality coffee that cannot be sold beyond local markets and local consumers. In Oromia, for example, marketing and sales are dominated by male heads of household, while women family members are responsible for selling the lower quality leftover coffee locally.³⁷⁹ Although women have higher access to sales opportunities when they are the head of their household,³⁸⁰ World Bank data shows that coffee revenue for female-headed households is 39% lower than that of male-headed households.³⁸¹

Child labour on family farms is common, and more common among boys. A study reporting on the findings of three randomised surveys, implemented in different seasons with Fairtrade³⁸² coffee households in rural Ethiopia found that child labour participation ranges from 45% in the main rainy season (55% of boys and 35% of girls) to 76% in the harvest season (80% of boys and 71% of girls), which suggests that coffee farming households rely heavily on their children's work on family farms during harvesting.³⁸³ A survey of 1,600 coffee producing households found that children provided some hours of their time to farm activities.³⁸⁴ Boys are more likely to be involved than girls across all seasons. However, girls' labour on farms is likely to be invisible or underreported by male heads of households. The Fairtrade study on child labour also found that the male heads of household systematically underreport girls' work in agricultural setting, relative to what is reported by the girls. This gap is reduced when the proxy respondent is the female spouse of the head of household. Female spouses, however, tended to underreport the labour of boys.³⁸⁵ Fairtrade standards encourage cooperatives to include a mitigation and elimination plan to prevent children from being employed whenever child work is identified as a risky activity.³⁸⁶

³⁷⁶Kemal, Emana and Shumeta (2019) ³⁷⁷Pathways Study Interview with Staff of Government Body ³⁷⁸Aregu, L., Puskur, R., & Bishop Sambrook, C. (2011) ³⁷⁹Kemal, Emana and Shumeta (2019) ³⁸⁰Kemal, Emana and Shumeta (2019) ³⁸¹ICO (2018) ³⁸²To note that "In contexts in which child labor is widespread, Fairtrade standards encourage cooperatives to include a mitigation and elimination plan to prevent children from being employed whenever child work is identified as a risky activity (i.e. work that jeopardizes schooling or the social, moral or physical development of the person). Child work on the household farm is allowed, provided the work is appropriate to the children's age and it takes place outside of school hours or during school holidays (Fairtrade International 2015)." in Galdo, Dammert and Abebaw (2019) ³⁸³Galdo, Dammert and Abebaw (2019) ³⁸⁴Dereje et al. (2016) ³⁸⁵Galdo, Dammert and Abebaw (2019) ³⁸⁶Galdo, Dammert and Abebaw (2019)

Processing activities at coffee milling houses are dominated by women.³⁸⁷ For example, in Jimma zone (in Oromia Region), over 16 primary coffee cooperatives work in the area and carry out processing and marketing activities. In total, 50 of the 75 employees who work in these cooperatives were women. They were more likely to work on drying coffee, rather than other processing tasks deemed less socially appropriate for women such as those requiring heavy labour and work at night.³⁸⁸ On the other hand, local collectors, as well as those who buy coffee to supply exporters, are more likely to be male. In Jimma zone (Oromia Region), local traders who collect coffee from village markets or farms to resell to suppliers are generally men. These collectors sell coffee with or without pulp for further processing activities, and they add value by bulking and transporting coffee. Suppliers, who buy coffee in larger volumes than other actors and supply them to exporters and domestic wholesalers, are also primarily men; in 2016, only 6% of the 48 registered and active suppliers were women.³⁸⁹

Both women and men work as local retailers. Local retailers sell coffee to end-customers (mostly urban) in shops, alongside other commodities.³⁹⁰ It is possible that women dominate in this activity. For example, a study in one *kebele* of Shebedino *woreda* (Sidama zone, SNNPR) included a

sample of retailers where 167 of the 186 were women. Women were however less likely to be wholesalers (42 women out of a sample of 283).³⁹¹

Only women own coffee houses (*bunabéts*). Coffee houses where the traditional coffee ceremony³⁹² is carried out, are common across Ethiopia. This ceremony symbolises feminised characteristics of hospitality, skill and hard work, and coffee houses are generally owned by young women who always prepare the coffee in their *bunabéts*.³⁹³ These coffee houses are increasingly becoming sources of self-employment for young women in Ethiopia, offering some form of economic empowerment but also constraining them (e.g. pressure to engage in sex work).³⁹⁴

Factors affecting women's economic empowerment in the coffee sector

The following table summarises available data and evidence on key barriers and opportunities for women's economic empowerment in the coffee sector, with further detail on available evidence provided further below.

³⁸⁷USAID (2010) in Amamo (2014) ³⁸⁸Kemal, Eman and Shumeta (2019) ³⁸⁹Kemal, Eman and Shumeta (2019) ³⁹⁰Kemal, Eman and Shumeta (2019) ³⁹¹Shitaye (2017) ³⁹²An important part of Ethiopian culture, the Ethiopian traditional coffee ceremony involves processing the raw, unwashed coffee beans into finished cups of brewed coffee. ³⁹³Johnson (2020) ³⁹⁴REACH (2020)

Summary of barriers to and opportunities for women's economic empowerment in the coffee sector

Structural	Normative	Individual
Barriers		
<p>Customary laws restricting women's land ownership</p>	<p>Gender norms restrict women's role in the coffee sector to low skilled and low paid roles</p> <p>Unpaid care and domestic work burden</p> <p>Women's limited mobility and access to markets</p> <p>Gender-based violence</p>	<p>Women's constrained land ownership and access to assets including farming equipment</p> <p>Limited control over income</p> <p>Limited access to cooperatives</p> <p>Women's constrained access to extension workers, and few extension workers are women</p>
Opportunities and entry points		
<p>Leveraging coffee certification programmes to increase the market attractiveness of women-grown coffee</p> <p>Land titling schemes that register women as co-owners of land</p>	<p>Working with communities to tackle gender inequalities and transform gender roles</p> <p>Promoting more gender-equitable intra-household decision making</p> <p>Increasing women's access to markets through cooperatives</p> <p>Prevention and response to gender-based violence (including economic forms)</p>	<p>Working with cooperatives to expand opportunities to women</p> <p>Improving women's access to extension services and training, while increasing female representation in the extension services sector</p> <p>Capacity building services intentionally targeted at women</p> <p>Holistic interventions which tackle women's education and skills, while building self-confidence and self-efficacy</p> <p>Promoting women's economic and social rights organisations, networks and trade unions</p>

Structural factors

Customary laws which continue to deny women’s right to own and control land, contribute to restricting women’s roles and opportunities in the coffee value chain.³⁹⁵ In regard to land, formal state laws (including the Ethiopian Constitution Article 35 No. 7³⁹⁶ and Revised Family Code (2000)) assert that women have equal rights to men regarding land use and access; however there is a significant disparity between what formal laws state and what is being practised on the ground.³⁹⁷ Please see section 4.1 for cross-cutting structural factors affecting women’s economic empowerment in Ethiopia.

Normative factors

Gender norms are a key driver of divisions of tasks within the coffee sector. A Pathways Study interviewee explained that social stereotypes, such as women being perceived to be more careful and patient than men, are a key driver of women’s restriction to manual tasks and office roles.³⁹⁸ A study in one *kebele* of Shebedino *woreda* (Sidama zone SNNPR) seems to confirm this, as it mentions that respondents refer to some activities as “men’s activities” and to others as “women’s activities”, as these have been traditionally allocated to men or women.³⁹⁹ However, the growing coffee market may also provide opportunities for women’s involvement in non-traditional

activities. For example, in the traditional Gedeo community, in SNNPR, women are increasingly being involved in farming activities. However, this has not translated into involvement in marketing activities, or increasing women’s access to land.⁴⁰⁰

Unpaid care and domestic labour are a constraint to women’s productivity in the sector. A study of coffee farming households in two districts of the Jimma zone of Oromia National Regional State found that men dominate productive roles, while women are concentrated in unpaid reproductive roles. Both men and women participate in community activities such as water and soil conservation, and maintenance of water, health and other resources. The study also found that women’s higher burden of reproductive care was because of expectations of gender roles in relation to childcare, household management, as well as home-based production.⁴⁰¹ Results from randomised surveys with Fairtrade coffee producing households, show gender differences in the time spent in both unpaid care and farming activities, with women spending over four times as many weekly hours in household chores (47 hours compared to 11 hours spent by male heads of households). By comparison, men spend more time in farm work (25 weekly hours on average during the main rainy season) than women (14 hours per week), although

³⁹⁵Tura (2014) ³⁹⁶This constitutional provision states: “Women have the right to acquire, administer, control, use and transfer property. In particular, they have equal rights with men with respect to use, transfer, administration and control of land. They shall also enjoy equal treatment in the inheritance of property.” ³⁹⁷Carleton (2021) ³⁹⁸Pathways Study Interview with Staff of Government Body ³⁹⁹Shitaye (2017) ⁴⁰⁰Bayu (2017) ⁴⁰¹Kemal, Emana and Shumeta (2019)

comparison of these two areas highlights the women's disproportionate time poverty.⁴⁰²

Women's limited mobility influences access to markets. A study in Oromia found that the further the market is from a household's home, the lower the quantity of coffee marketed by women. A key barrier to women's mobility are strict norms around the acceptability of women travelling away from their home, as well as high transport costs.⁴⁰³ Similarly, an earlier study found that women are more likely to sell coffee to markets when these markets are closer.⁴⁰⁴ In addition, when development (i.e. extension services) centres are further away from women, the quantity of coffee supplied by women was observed to be lower; this was attributed to women having limited contact with extension agents to gain downstream support, e.g. advice on marketing activities.⁴⁰⁵

Women have limited decision-making power in the sector. For example, data from a survey of over 1,600 coffee farmers in 12 coffee producing zones found that in half the cases (48%) decisions on the management of coffee plots was done jointly. However, when decisions were made by one person, this was generally the man (47% of cases). Overall, the study found only 3.5% of cases where women were the sole decision makers.⁴⁰⁶

Coffee value chain actors can support communities to promote gender equality.

As part of key corporate social responsibility (CSR) strategies, global roasters/retailers are involved at local level through their own foundations, as exemplified by the [Costa Foundation](#), which is run by British coffeehouse chain [Costa Coffee](#). In Ethiopia, Costa Foundation has established self-funding Girl's Clubs (which are also open to boys) in communities with a history of early marriage; girls receive support with their education, their lives, their health and their futures.

In addition, extracurricular classes on gender equality are provided in all Costa partner schools. In two of the communities where the foundation is present, this led to the abolition of the practice of forced marriage.⁴⁰⁷

Success Story: Costa Foundation Schools in Rural Ethiopia

Costa Foundation has also established and funds 28 schools which have seen enrolment increased by 37.2% over 2020 to 2021. The ratio of girls to boys in these schools increased from a baseline average of 0.66 to 0.78 indicating that these schools are enrolling more girls who used to be out of school.⁴⁰⁸

⁴⁰²Galdo, Dammert and Abebaw (2019) ⁴⁰³Kemal, Eman and Shumeta (2019) ⁴⁰⁴Marcel et al. 2005, in Kemal, Eman and Shumeta (2019) ⁴⁰⁵Kemal, Eman and Shumeta (2019) ⁴⁰⁶Dereje et al. (2016) ⁴⁰⁷Costa Foundation (n.d.) ⁴⁰⁸The Costa Foundation (2021)

Individual factors

Women coffee farmers have lower educational outcomes than men. For example, among a sample of farmers in Sidamo zone, 95% of women and over 50% of men have not completed primary education.⁴⁰⁹

“In our company almost 95% the work is done by women, but our culture says men are landowners. It's mostly uneducated women and/or housewives involved in coffee. They're uneducated because there are no schools near them. Those with some education work as secretaries and accountants. In our country, there are no motivating positions for women and agriculture needs more awareness.”

Source: Pathways Study Interviewee

Women's limited land ownership and low access to farming equipment hinders their opportunities in the sector. In the Oromia Region, for example, although both men and women report accessing land and farming equipment (50% of households), men have more control over these resources.⁴¹⁰ Another study found that women-managed plots also tend to be smaller and have poorer soil quality.⁴¹¹ Furthermore, women generally have insufficient financial resources, hindering

their access to even basic equipment or inputs to start producing coffee on a larger scale for local cooperatives. Due to this, they face significant limitations and often remain restricted to small-scale agriculture with low and irregular revenues.

“Women don't own land, even though the law supports them. They face problems even when they hold legal documents proving ownership - men remain in control. Secondly, when they own land, their tenants often illegally take over. So, the key issue relates to land ownership.”

Source: Coffee Sector Stakeholder, Pathways Study Interview

Women have lower access to and control over income. Both men and women participate in income-generating activities, although men are more likely to have control over this income.⁴¹² An example of this is the unequal distribution of income control over coffee livelihoods in Goma *woreda*, where all community members rely on coffee as a source of income. In this community, the decision on when to sell crops for cash income is fully controlled by husbands who tend to sell in bulk only once a year, despite household needs. In some cases, women must resort to selling small amounts of

⁴⁰⁹Nespresso (n.d.) ⁴¹⁰Kemal, Eman and Shumeta (2019) ⁴¹¹Dereje et al. (2016) in Mas Aparisi (2021) ⁴¹²Kemal, Eman and Shumeta (2019)

coffee without the husband knowing, to meet household cash and food needs especially early in the season. Women, however, are less able to bargain for good prices, and may sell below market price due to their lower social capital. Selling in secret may also increase risks of intimate partner violence and affects coffee quality and overall household income. Overall, it is estimated that men control up to 90% of the income.⁴¹³

Participation in the coffee value chain is linked to membership in cooperatives, which is generally open to those who are registered as heads of household and pay tax within the village. Cooperatives sell raw or semi-processed coffee to larger farmers' unions, which may also collect coffee directly from the farmers in bulk, and then add value by hulling, clearing, sorting, packaging and exporting the transformed products to international buyers. Crucially, cooperative unions create market linkages with international traders, and provide collateral and technical support to farmers and cooperatives. The unions also represent local cooperatives in their marketing activities. As for large-scale commercial producers, they negotiate directly with buyers or through wholesalers. Female members of male-headed households are excluded from participation and therefore excluded from benefiting from sales or price premiums for higher quality coffee.⁴¹⁴ Only 5% of coffee

producing households are female-headed (based on a survey of 1,600 households in 12 major coffee producing zones of Ethiopia in 2014).⁴¹⁵ A 2018 report however reported that 19% of coffee producing households in Ethiopia are headed by women.⁴¹⁶

Women represent a minority of coffee sector cooperative members. In a study with a sample of 73 cooperatives, only 20% of members were women, and women made up only 18% of leadership positions.⁴¹⁷ In the Oromia Region, there are 217 member cooperatives of the Oromia Coffee Farmers' Cooperative Union, which overall provides membership to over 200,000 farmers of which only 22,000 are women.⁴¹⁸ Lower land ownership also precludes women from joining cooperatives, as this may be a requirement for joining.⁴¹⁹ A study of coffee farming households in two districts of the Jimma zone of Oromia National Regional State found that the majority of women do not have access to cooperatives (only in 2% of surveyed households). Among over 16 cooperatives, on average, 44 of the 155 members of each cooperative were women. Few women were in managerial roles such as committees. Several barriers drive lower participation, which include lack of networks.⁴²⁰

⁴¹³Aregu, Puskur and Bishop Sambrook (2011) ⁴¹⁴Kemal, Emana and Shumeta (2019) ⁴¹⁵Dereje et al. (2016) ⁴¹⁶International Coffee Organization (2018) ⁴¹⁷Woldu, Tadesse and Waller (2013) in Mas Aparisi (2021) ⁴¹⁸Fairtrade America (n.d.) ⁴¹⁹IDE (2020) ⁴²⁰Kemal, Emana and Shumeta (2019)

There are positive examples of initiatives working with farmer organisations and cooperatives to improve participation and leadership of women. For example, the [Oromia Coffee Farmers' Cooperative Union Ltd \(OCFCU\)](#) is the largest Fairtrade certified producer in Ethiopia.⁴²¹ The Fairtrade certification premium and financial support from roasters are re-invested into social projects including schools, health posts, clean water and bridges, among others. Women hold prominent positions in OCFCU, and all six varieties of the cooperative's award-winning coffee are produced with organic techniques in bird-friendly conditions.⁴²² Technoserve is an NGO working with 96 coffee farmer organisations to integrate gender into the institutional structures of cooperatives. Activities include staff gender training and establishment of Gender Leads, who carry out discussions with cooperatives and government leaders. In addition, cooperatives are supported to select someone to represent women in cooperative meetings, and female leaders are given capacity building. As a result of the project, all cooperatives delivered a gender policy with targets and action plans. The total female membership increased by 25%, while women in leadership doubled.⁴²³ Finally, the [International Women's Coffee Alliance \(IWCA\) Ethiopia Chapter](#) was established in 2016 to support women in the coffee sector and currently has 40 members, including a

female President and female Vice President. Activities include sharing information on the overall sector, providing capacity building/training, creating supply chain links and a networking environment so that women can support and learn from each other.⁴²⁴ The IWCA is currently working towards more sustainable livelihoods and increased presence of women in the coffee value chain, while creating a platform to engage their members in capacity building, skills development and networking opportunities.⁴²⁵

Women are less likely to access extension services or training. A 2010 study found that 28% of male-headed households were visited by an extension worker, compared to 20% of female-headed households.⁴²⁶ A large-scale survey of 1,600 coffee producing households (2014) found that just over half of households were visited by an extension worker. Male members were contacted 47% of the time, and female members, 15% of the time, while in 38% of cases households were not contacted at all.⁴²⁷ In Jimma (Oromia Region), the main sources of extension services for coffee producers are cooperatives and district-level agricultural offices. However, a study showed that only a third of the 183 (85%) respondents who did have contact with extension agents were women (121 men and 62 women). Women were also less likely to have participated in training that had been provided in 2015/2016 on management,

⁴²¹SCS Global (n.d.) ⁴²²Fairtrade America (n.d.) ⁴²³Uncited in ICO (2018) ⁴²⁴EWiCA (2019) ⁴²⁵EWiCA (2019) ⁴²⁶World Bank and IFPRI, (2010), in ICO (2018) ⁴²⁷Dereje et al. (2016)

marketing, harvesting of different agricultural commodities (57 women versus 93 men).⁴²⁸

Women are also less represented among extension workers. For example, among Development Agents (DAs) who staff the 8,500 Farmer Training Centres that exist across the country, only between 12% to 22% are women, depending on the region (as of 2009 which is the most recent available data). DAs are those in charge of providing extension activities in rural areas.⁴²⁹

However, when capacity building services intentionally target women, they can result in increased participation. The study in Jimma zone (Oromia Region), for example, found that participation in training positively affects marketed surplus (at 10% significance level), more specifically increased coffee marketed by women by 0.41 quintals⁴³⁰ (keeping other variables constant). Contact with extension agents, and frequency of contacts were both factors that increased quantity supplied, and this is explained by the increase in skills resulting from contact.⁴³¹ Positive examples of improved economic outcomes as a result of training include the Technoserve and Nespresso partnership (2013), which launched the AAA Sustainable Quality Programme, an initiative delivering farm management skills to 18,000 coffee farmers, encouraging them to practise sustainable and profitable farming methods. When husbands attended

the training with their wives, the percentage of women involved rose from 1% in 2013 to 30% in 2017. Women gather monthly on a demonstration plot to learn techniques such as stumping, composting and fertilising to increase yield on their coffee farms and therefore help boost their income. As part of the programme, women hold roles including Focal Farmer and AAA Field Agronomist.⁴³² The partnership also works to train women agronomists (79 agronomists supporting 4,000 farmers) and supports them to take on leadership roles within cooperatives.⁴³³

Recommendations

This section highlights sector-specific recommendations, for consideration by public and private sector stakeholders, to improve women's economic empowerment within the coffee sector.

1. Strengthen the coffee sector's commitment to gender equality.

Recommended strategies include:

- Improve internal gender capacity⁴³⁴ of market actors including gender-related knowledge, attitudes, skills of staff, and enhance institutional policies and practices.
- Support industry actors, including international buyers, to commit to policies, regulations, and actions that further gender equality, and monitor gender equality commitments.

⁴²⁸Kemal, Emana and Shumeta (2019) ⁴²⁹Ethiopia, MOARD 2009a in The Holland Africa Poultry Partners (n.d.) ⁴³⁰1 quintal equals 100 kilograms ⁴³¹Kemal, Emana and Shumeta (2019) ⁴³²Nestlé (2017) ⁴³³Nespresso Professional (n.d.) ⁴³⁴Gender capacity refers to the knowledge and skills to engage with gender equality issues. See European Institute for Gender Equality (EIGE (n.d.)

- Increase the sector's understanding of women's current and potential contribution to the value chain through stakeholder engagement and dissemination of research findings, and work with key actors including international buyers to recognise and reward women's labour, ensuring that women's positions in the supply chain are made more formal and visible to key actors.
 - Create partnerships between buyers and sellers (including women-led cooperatives), to source and market coffee produced by women, and coffee produced under initiatives that foster gender equality throughout the coffee value chain.
 - Develop economic incentives for coffee produced by women-led cooperatives. This may be a price premium for coffee that can be traced back to women-led cooperatives.
 - Leverage existing initiatives, including certification programmes, and initiatives working to build specific skills (such as agronomy) to increase reach and targeting of women in the sector.
- 2. Work with market actors including the government to improve the reach of interventions to women farmers, and to tailor support to women farmers' needs.**

Recommended strategies include:

- Work with cooperatives and district-level agricultural offices to specifically target women and recruit women extension agents. Train all agents and trainers (men and women) to provide inclusive services and to engage household members who are not the head of the household. Design training (including timing and locations) for women taking domestic responsibilities into consideration.
- Work with communities to raise awareness of women's rights including land rights.

3. Improve women's human, social and economic capital through leveraging collectives and cooperatives.

Recommended strategies include:

- Support women through collectivisation, leveraging existing women's cooperatives, and supporting the formation of new women-led cooperatives, to improve women's access to quality land and assets.
- Targeted interventions to improve women's voice, decision making and self-efficacy; more equitable norms around leadership and land rights; and opportunities for women to move into new or upgraded roles.
- Leverage women's cooperatives and collectives for human capital interventions, including efforts to improve soft skills around leadership, negotiation and conflict management;

as well as efforts to improve business capabilities and agricultural skills to boost productivity and income.

- Promote women's participation in mixed-gender cooperatives, through promotion of inclusive organisational cultures: explicit and intentional strategies, that promote women's participation in leadership, women's voice and participation in decision making, and address discrimination and barriers along the value chain. Advocate for flexible membership criteria, such as extending membership to household members who are not the head of household.
- Implement capacity building for cooperatives on gender mainstreaming.

4. Address inequitable norms and attitudes at the household level.

Recommended strategies include:

- Support initiatives strengthening women's access to formal land titling.
- Livelihoods and economic empowerment initiatives coupled with gender-transformative interventions at the household level that increase women's access to and control over economic assets; access to financial services; financial literacy and independence.
- Mechanisms to reduce vulnerability to economic and other forms of gender-based violence; support women's ability to seek essential GBV services, including legal help, if required.

- Carry out household and community dialogues or other behaviour change interventions that promote equitable intra-household decision making, and address gender-inequitable attitudes and norms around gender roles and mobility in the value chain.
- Monitor, track and mitigate against any signs of backlash including increased rates of gender-based violence and intimate partner violence.
- Advocate for and support government policies and programme initiatives to tackle child labour in the coffee sector.

5. Support household- and community-level interventions addressing women's unpaid care and domestic work burdens.

Recommended strategies include:

- Carefully assess the extent to which project activities could increase women's workload, and actively incorporate time- and labour-saving interventions targeted at women.
- Work with the private and public sectors to ensure that households have access to energy, water, hygiene and sanitation facilities in order to reduce women's and girls' drudgery and time; and women to have access to creche and health facilities for improved maternal health and childcare.

6. Address research gaps and build evidence of what works.

Recommended strategies include:

- Commission research to:
 - Better understand barriers and opportunities for women retailers and coffeehouse owners, including demand for financial services, the impact of the minimum coffee sale price, and the barriers and challenges faced by different marginalised groups of women in the coffee value chain including women with physical or other challenges.
 - Assess the gendered impacts of COVID-19 on coffee farmers, and opportunities to build women coffee farmers' resilience against future shocks.
- Conduct research on the (secondary) impact of the Tigray conflict on women's participation in the coffee value chain.
- Ensure rigorous monitoring of interventions to strengthen the evidence based on what works for achieving increased women's economic empowerment in the coffee sector.
- Ensure meaningful participation of women farmers in design of all interventions, including through participatory methods.

5.2 The livestock sector

Sector overview



Livestock includes cattle, sheep, goats, horses, camels and poultry. Livestock contributes 17% of national GDP (and 39% of agricultural GDP), or 25% of GDP when considering both the contribution of processing and marketing and the indirect contribution in organic fertiliser and traction.⁴³⁵ Livestock output growth has been slower than overall GDP growth, however, exports of meat, live animals and animal products slightly increased to 13% of total value of exports in 2015 (compared to 11% in 2005). Local real expenditure on animal-sourced food (ASF) has increased. ASF is expected to increase in importance⁴³⁶ as population growth is expected to increase local demand over the next decades.⁴³⁷

The livestock sector has been growing by 6% a year, largely due to an increase in the number of animals. In 2015, the overall livestock stock was 50% higher than 10 years previously, and it is currently the fifth largest stock in the world. Although adoption of improved breeds and adoption of modern inputs or improved production methods have increased, these have had a marginal role in sector growth.⁴³⁸

⁴³⁵Shapiro et al. (2017) ⁴³⁶Bachewe et al. (2018) ⁴³⁷FAO (2019) ⁴³⁸Bachewe et al. (2018)

The government's GTPs (I and II) identified three key livestock commodity value chains as key contributors to long-term sector development: poultry for chicken meat and eggs; crossbred cattle mainly for milk and red meat; and milk from ruminants (indigenous cattle, sheep, goats and camels).⁴³⁹ The new National Development Plan (2021-2030) includes a focus on livestock, animal feed and health, with objectives including to improve income and livelihood options for farming and pastoral communities through increased productivity and competitiveness.⁴⁴⁰

Livestock contributes to the livelihoods of 60-70% of the (mostly rural) Ethiopian population.⁴⁴¹ Livestock serves several purposes, including providing food for farming households, ploughing the land for crop production, or being sold for cash (including providing input for leather manufacturing). Majority (92%) of farming households' own livestock, including 80% of households who own cattle, and 58% who own poultry. The number of cattle was close to 60 million in 2015. Other large stocks of livestock were poultry and sheep (both around 30 million), followed by sheep at 15 million.⁴⁴² Chicken is the main animal used for meat production, followed by sheep and goat. Cattle and camels are less likely to be used for slaughter, due to higher returns for milk production.⁴⁴³

The majority (95%) of national milk supply is marketed through informal channels and unprocessed, due to a lack of infrastructure in rural areas⁴⁴⁴ and the large costs associated with the formal trade, including machinery, packaging, quality assurance, transport and export licences. The share of farmers' production destined for their own household consumption is 83% for milk, 60% for butter and 86% for cheese.⁴⁴⁵

Livestock is kept across three different livestock systems: (i) grazing or grassland systems of the lowlands; (ii) the rainfall deficient; and (iii) the rainfall sufficient mixed-farming systems of the higher elevations. Most cattle are in the mixed systems, goats and camels are predominantly in the lowlands, while sheep are equally distributed. In the lowlands, there is a higher proportion of households living in poverty, with poverty less prevalent in rainfall sufficient mixed-farming systems. Lowest income per animal is found in village poultry in all areas, as well as goats in the lowlands. Livestock income contributions to households come primarily from milk (34%) and meat (32%).⁴⁴⁶

Several associations represent actors in this sector. These include, for example, the Ethiopian Meat-Producer-Exporters Association (EMPEA),⁴⁴⁷ which supports 15 member companies; the Ethiopian

⁴³⁹Shapiro et al. (2017) ⁴⁴⁰See <https://europa.eu/capacity4dev/file/109230/download?token=rxippQKh> ⁴⁴¹Spangler (2021)

⁴⁴²Bachewe et al. (2018) ⁴⁴³Bachewe et al. (2018) ⁴⁴⁴Tesfaye et al. (2018) ⁴⁴⁵Tesfaye et al. (2019) ⁴⁴⁶Shapiro et al. (2017)

⁴⁴⁷EMPEA (n.d.)

Poultry Producers and Processors Association (EPPPA)⁴⁴⁸ which represents 55 entrepreneurs; the Ethiopian Milk Processors Industry Association (EMPIA)⁴⁴⁹ which represents milk processors and input providers with 32 milk processing facilities in the country;⁴⁵⁰ and the Ethiopian Livestock Traders Professional Association (ELTPA)⁴⁵¹ oversees 120 members. The Ethiopian Meat and Dairy Industry Development Institute (EMDIDI)⁴⁵² is the national body in charge of carrying out research across the milk, meat, animal feed, honey, fish and poultry segments. Supporting the overall sector, the Ethiopian Animal Feed Industry Association (EAFIA)⁴⁵³ represents 10 unions and 36 feed processors and ingredient suppliers.

The COVID-19 pandemic impacted livestock and dairy farmers, primarily through the increase in transportation and input costs. In addition, shortages in feed supply, along with reduction in artificial insemination delivery services and animal health services, were experienced by 40+% of dairy farmers.⁴⁵⁴ As dairy farming is a labour-intensive activity, farmers were also affected by the decline in the availability of farm labour due to the spread of COVID-19. These factors led to 64% of farmers experiencing a decline in milk production and milk sales to processors.⁴⁵⁵ This affects women's livelihoods due to their central role in milk production.⁴⁵⁶ Other important challenges are

climate change and the increasing occurrence of drought,⁴⁵⁷ and increasing prices for animal feed.⁴⁵⁸ For example, the recent drought in Borena zone (Oromia Region) resulted in about three million cattle lost,⁴⁵⁹ and resulted in a health and humanitarian crisis including food insecurity.⁴⁶⁰ Drought has also resulted in disease outbreaks (cholera, measles) and severe acute malnutrition as reported in areas of Somali Region, Oromia Region and SNNPR.⁴⁶¹

Due to the impact of livestock farming on the environment (which accounts for 48% of the country's total greenhouse gas (GHG) emissions), the government is promoting a shift from non-dairy cattle rearing to goat, sheep and chicken rearing to help reduce emissions.⁴⁶² While small livestock are more resilient to droughts, the challenge for the government may be convincing pastoralist communities to move away from the large, high(er) status, high(er) value animals to smaller livestock, as the personal incentive for them to do so is not yet proven.⁴⁶³

The 2020 to 2022 Tigray conflict had a devastating impact on the livelihoods of conflict-affected communities.

Challenges for farmers included more limited access to farms, inputs and services and devastation of agricultural infrastructure including veterinary clinics. Pastoralists and

⁴⁴⁸EPPPA (n.d.) ⁴⁴⁹Addis Fortune (2014) ⁴⁵⁰MercyCorps (2016) ⁴⁵¹FOB Business Directory (n.d.) ⁴⁵²EMDIDI (n.d.) ⁴⁵³EAFIA (n.d.) ⁴⁵⁴Meseret et al. (2021) ⁴⁵⁵Meseret et al. (2021) ⁴⁵⁶Mercy Corps (2016) ⁴⁵⁷FEWS NET (2021) ⁴⁵⁸Tegegn (2021) ⁴⁵⁹Borkena (2023) ⁴⁶⁰Sintayehu, A. & Sintayehu, W. (2023) ⁴⁶¹Mazango, E. (2023) ⁴⁶²Farand (2021) ⁴⁶³Farand (2021)

agropastoralists reportedly lost livestock due to looting, displacement and diseases. In response, humanitarian actors including the Food and Agriculture Organization supplied farmers with seeds, livestock vaccination and treatment, cash transfers and restocking of veterinary clinics.⁴⁶⁴

Livestock ownership and proceeds

Ownership of animals varies depending on livestock species. Studies indicate that men own most of the high-value livestock species, while women tend to own smaller and lower-value animals and secondary products (dairy).⁴⁶⁵ For example, sole ownership of cattle is uncommon for women, although they may own cattle jointly.⁴⁶⁶ Female-household heads are more likely to own small animals, due to lack of access to income from large animals.⁴⁶⁷ Women may keep small livestock such as chickens, and they are the primary owners of village chickens.⁴⁶⁸ Female-headed households generate more income from bird sales than male-headed households, and in female-headed households, women heads were responsible for the majority (86%) of birds sold. In male-headed households, only 31% of the birds were sold by female spouses (compared to 57% by male household members). Other household members (male and female children) shared responsibility for the remaining sales.⁴⁶⁹

Women's roles in the livestock sector

Women play a major role in livestock husbandry and management practices, although this varies across livestock types. All household members participate in these practices, and women do so even when they are not the owners of the livestock, e.g. cattle belonging to their husbands. Women's roles are often less valued or invisible, and they are generally responsible for most of the labour-intensive activities.⁴⁷⁰

Production/Rearing

Gender roles vary across livestock species, and are influenced by a range of factors, including the farming system and technology used, as well as wealth and socioeconomic factors.⁴⁷¹ Generally, women and girls provide more work in tasks such as feeding and grazing of cows, watering, managing vulnerable animals (such as calves or pregnant and sick animals), cleaning of barns, gathering and making dung cakes, transporting farm manure, as well as dairy and poultry activities. Children (both male and female) tether and herd animals.⁴⁷²

⁴⁶⁴FAO (2021) ⁴⁶⁵Kinati and Mulema (2018) ⁴⁶⁶Mogues et al. (2009) ⁴⁶⁷Wondmeneh et al. 2014 in Kinati and Mulema (2018)

⁴⁶⁸The Holland Africa Poultry Partners (2012) ⁴⁶⁹ILRI (2016) in Management Entity (2021) ⁴⁷⁰Kinati and Mulema (2018) ⁴⁷¹Kinati and Mulema (2018) ⁴⁷²Kinati and Mulema (2018)

Processing

Women are solely responsible for processing of milk (storing, processing and value addition), and marketing of milk products,⁴⁷³ although this is more likely to be done informally and in local markets.⁴⁷⁴

Women are less likely to be involved in processing of livestock commodities when large capital investment is required. Women are instead able to enter processing when capital required is low, or where processing requires relatively low cost equipment.⁴⁷⁵ Consequently, women's livestock operations are also characterised by traditional, often manual work (usually completed by one woman, not at cooperative level), including manual milking (instead of using milking machines) and handmade leather products from cattle hides/skins (e.g. instead of using leather-specific sewing machines, for example), which further hinders the increased productivity and income of women.

On the other hand, men tend to dominate in tasks associated with higher social status. These include barn preparation/construction, feeding oxen, herding, taking animals to veterinary clinics, assisting delivery and marketing of ruminants supported by young boys.⁴⁷⁶ Men also dominate in heavier manual tasks such as building animal shelters and slaughtering.⁴⁷⁷

A study found that in Amhara and Gurage societies, women were mostly involved in the

routine, "dirty", home-based and low status tasks for livestock, while men mainly engaged in infrequent, public-facing tasks.⁴⁷⁸

Limited information is available on gender roles in industrial processing.

However, interviewees for the Pathways Study suggested that half of the industrial milk processing workforce are women, as well as over half of the chicken processing workforce. Another Pathways Study interviewee suggested that there is a hiring preference for men in meat processing plants, as it is assumed that the jobs are too risky for women.⁴⁷⁹

Marketing

Women are more likely to market and sell small livestock and poultry, as well as eggs and dairy products. Selling of large livestock and cattle is mostly a male domain.⁴⁸⁰ At local markets, chickens are sold by sellers without a permanent stall, often together with eggs. In some areas there is demand for frozen chicken. For example, in the city of Hawassa, some women have started selling frozen local chicken, which is frozen and stored at their houses, where space for freezers has been made.⁴⁸¹ It is not clear whether these women have better access to capital, or which enabling factors support them in this investment.

⁴⁷³Kinati and Mulema (2018) ⁴⁷⁴Obosha (2020) ⁴⁷⁵Obesha (2020) ⁴⁷⁶Kinati and Mulema (2018) ⁴⁷⁷Obosha (2020) ⁴⁷⁸Hirut, B.H. (2010) ⁴⁷⁹Pathways Study Interviews with Sector Stakeholders ⁴⁸⁰Mogues et al. (2009) ⁴⁸¹The Holland Africa Poultry Partners (n.d.)

Female heads of households are more likely to be involved in livestock as a main source of income, but less likely to participate in livestock markets. A study drawing on quantitative data found that 14.3% of female heads reported their main occupation as livestock rearing (while for 35.3% of female household heads it was farming, and 34.5% was domestic work). Among male household heads, 7.4% were livestock farmers, compared to 86.9% whose main activity was farming, and for 0.5% it was domestic work.⁴⁸² However, another study found that the gender of the household head was a key factor in participation in livestock markets, indicating that female household heads are less likely to access markets to the same extent as male household heads.⁴⁸³

Other roles

Limited information is also available on women's participation in value chain governance actors or associations.

It is however possible that women are not adequately represented. For example, the [Ethiopian Meat-Producer-Exporters Association \(EMPEA\)](#), which supports 15 member companies including slaughterhouses, meat processors and export abattoirs, has an all-male board of directors.⁴⁸⁴

Factors affecting women's economic empowerment in the livestock sector

The following table summarises available data and evidence on key barriers and opportunities for women's economic empowerment in the livestock sector, with further detail on available evidence provided further below.

⁴⁸²Mogues et al. (2009) ⁴⁸³Mamo & Deginet (2012) in Kemal, Eman and Shumeta (2019) ⁴⁸⁴Seleshe, S., Jo, C., & Lee, M. (2014)

Summary of barriers to and opportunities for women’s economic empowerment in the livestock sector

Barriers		
Structural	Normative	Individual
<p>Customary law discriminating against women in access to land</p> <p>Lack of gender capacity⁴⁸⁵ across value chain actors</p> <p>Women in the sector are often ignored by state actors, with policy focusing more on male farmers and male household heads</p>	<p>Women control some activities (primarily poultry and milk), however when these activities become more profitable, men take over ownership and control</p> <p>Decision-making power for more lucrative activities remains with men</p> <p>Determinants of power relations within households include marriage and inheritance, as well as age and level of education</p> <p>Discriminatory social attitudes and norms that define women’s unpaid care and work responsibilities influence women’s roles</p> <p>Social norms on owning assets and earning incomes influence women’s livestock ownership and control; and contribute to married women’s exclusion from cooperatives</p> <p>Women’s mobility constrains their access to markets and extension services</p>	<p>Women have limited human capital. This is also a barrier to leadership and voice in the community</p> <p>Limited interaction with extension service workers. When services are provided to women, they focus on small ruminants and poultry</p> <p>Women are excluded from governance bodies such as communal pasture management institutions</p> <p>Married women are excluded from livestock cooperatives as only heads of households can participate</p> <p>Women are less likely to own large animals</p> <p>Women have limited access to, and ownership and control of livestock resources, including social capital and financial capital or credit</p>

⁴⁸⁵ Gender capacity refers to the knowledge and skills to engage with gender equality issues. See European Institute for Gender Equality (EIGE (n.d.))

Summary of barriers to and opportunities for women's economic empowerment in the livestock sector

Opportunities and entry points

Structural	Normative	Individual
<p>Women's Development and Change Strategy includes focus on agriculture and animal husbandry</p> <p>Gender-responsive land-titling systems and programmes</p> <p>Productive Safety Net Programme (PSNP)</p>	<p>Improving women's power and role in intra-household decision making</p> <p>Tackle harmful gender norms and attitudes at the community level</p> <p>Interventions aimed at reducing women's unpaid care burden and redistribution of household care and domestic responsibilities</p> <p>Prevention and response to gender-based violence (including economic forms)</p>	<p>Women and youth are already present in cooperatives for feed processing and can become more active/influential</p> <p>Strengthening practices in areas women dominate, while considering risks of increased profitability</p> <p>Increasing women's access to social and economic capital through cooperatives</p> <p>Improving women's access to extension services and training</p> <p>Promoting women's economic and social rights organisations, networks and trade unions</p>

Structural factors

To promote pastoral and semi-pastoral growth, the 15-year Women’s Development and Change Strategy was introduced in 2017. The programme prioritises equality and active participation of women in savings and credit services, improved production schemes in agriculture and animal husbandry, and infrastructural development. The Productive Safety Net Programme (PSNP) attempts to create an enabling environment that involves poor female farmers with financial credit institutions. The aim is to enhance their asset base for better livelihoods. However, women are often invisible in agricultural policy which typically targets male household heads.⁴⁸⁶

Furthermore, despite clear policy commitment towards enabling women’s property and land rights, customary laws continue to deny women’s right to inherit, own and control rural land and productive assets including livestock.⁴⁸⁷ Legal frameworks around land tenure insecurity for divorced women; limited availability of input resources such as labour, oxen and credit; and unfavourable arrangements around sharecropping also perpetuate gender inequality in the sector.⁴⁸⁸

Note: Please see section 4.1 for more cross-cutting structural factors affecting women’s economic empowerment in Ethiopia.

Normative factors

Decision-making power for more lucrative activities remains with men. These include livestock production, higher-income husbandry activities, marketing, collection of money and income expenditure.⁴⁸⁹ Women are more likely to make decisions on small animals, including chicken.⁴⁹⁰ Men tend to control the income from larger livestock, although joint enterprises do exist in both cattle and poultry, where both workload and benefits are shared. It is less common for women to control benefits, with some exceptions in poultry or dairy products in some parts of the country.⁴⁹¹

Men dominate control and management of income of all animals, except for poultry.

This is the case even when women and girls are fully responsible for the livestock keeping activities. For example, women may own small livestock such as sheep and goats, but men maintain higher control over the income from sales of these animals.⁴⁹² More generally, heads of household are the ones who retain responsibility of livestock sales and management of income.⁴⁹³

Women do maintain some control over poultry,⁴⁹⁴ which can contribute up to a quarter of family income. Women make decisions over income generated from sales of birds (solely in 30% of cases, and jointly with men in more than half of cases,

⁴⁸⁶IDRC (2020) ⁴⁸⁷Tura (2014) ⁴⁸⁸Mogues et al. (2009) ⁴⁸⁹Mulema et al. (2017), Mulugeta and Amsalu (2014), Hebo (2014), Zahra et al. (2014), in Kinati and Mulema (2018) ⁴⁹⁰Kinati and Mulema (2018) ⁴⁹¹Obosha (2020) ⁴⁹²Mulema et al. 2017 in Kinati and Mulema (2018) ⁴⁹³Fafchamps and Quisumbing (2002) in Kinati and Mulema (2018) ⁴⁹⁴Obosha (2020)

according to two different studies in 2016).⁴⁹⁵ This income is often used to cover school expenses.⁴⁹⁶ In female-headed households, women control the majority of income (90% from bird sales.⁴⁹⁷ Women are more likely to control income from sales of eggs (60% in male-headed and 90% in female-headed households).⁴⁹⁸

When activities become more profitable, men take over ownership and control.

In dairy, for example, traditionally women control income. However, if this income becomes a larger source of family income, men seize ownership and control.⁴⁹⁹ In most dairy cooperatives, men are the registered members and collect the money, even though women remain responsible for milking cows and delivering milk. With commercialisation of household dairy activities through male-dominated cooperatives, women have lost control of cash income, which had previously been in their domain.⁵⁰⁰ Similarly men get involved in poultry production once benefits and market access have increased.⁵⁰¹

Determinants of power relations within households include marriage and inheritance, as well as age and level of education. Women are more likely to have decision-making and bargaining power over inherited livestock, as well as livestock

that has been bought with women's own income. When women have access to higher amounts, they are involved more in decision making, although this is not the case when the marriage was arranged. Older and better educated women also tend to have more decision-making power over sales of livestock. Evidence from the Oromia Region suggests that women are increasingly participating in decision making over livestock sales, although the final decision remains with the head of household.⁵⁰²

Social norms influence women's participation in the value chain in a variety of ways, and these include discriminatory social attitudes and norms that define women's unpaid care and work responsibilities.⁵⁰³ Women have less time to participate in market activities as they are expected to stay close to home.⁵⁰⁴ This is a key driver of the type of activities that women can carry out, limiting them to those that are near the home or that are closely related to household activities.⁵⁰⁵ Women spend more time than men on livestock-related activities, and have greater responsibility in upstream tasks in the livestock value chain (e.g. animal rearing, cow milking, egg gathering, etc.).⁵⁰⁶ Young girls may support women in these tasks, although less so during school terms.⁵⁰⁷

⁴⁹⁵Gebremedhin et al. (2016) and ILRI (2016) in Management Entity (2021) ⁴⁹⁶Gebremedhin et al. (2016) in Management Entity (2021) ⁴⁹⁷ILRI (2016) in Management Entity (2021) ⁴⁹⁸ILRI (2016) in Management Entity (2021) ⁴⁹⁹Zahra et al. (2014) ⁵⁰⁰Kinati and Mulema (2018). Note: There is some mixed evidence around this, with Tangka et al. 2002 (in Kinati and Mulema (2018)) finding increased income in the hands of women. ⁵⁰¹Akilu et al. 2007a in Kinati and Mulema (2018) ⁵⁰²Fafchamps and Quisumbing (2002) and Mulema et al. (2017) in Kinati and Mulema ⁵⁰³Obosha (2020) ⁵⁰⁴Obosha (2020) ⁵⁰⁵Obosha (2020) ⁵⁰⁶Kinati and Mulema (2019) ⁵⁰⁷Kinati and Mulema (2016) in Kinati and Mulema (2019)

Social norms on owning assets and earning incomes influence women's livestock ownership and control. Negative attitudes may discourage women from owning and controlling animals. An example of this is the belief that men will lose their position as the head of household once women own and control livestock and gain benefits from them.⁵⁰⁸

Women's mobility constraints influence their access to markets and extension services. Household wealth is also a key enabler of mobility (for men), as men from these households can travel to more distant markets and negotiate higher prices, as well as sell to private traders and cooperatives. Poorer farmers and women must settle with prices at local markets that they can reach on foot, and generally sell directly to end-consumers.⁵⁰⁹ In the case of milk sales, women walk long distances (≥ 10 kilometres), and this can create some food safety risks as the milk is not refrigerated when in transit.⁵¹⁰ Women may also walk long distances to gather forage for their livestock, and this can be addressed by supporting them in learning better agricultural practices and growing feed closer to home.⁵¹¹

Individual factors

Women's lower human capital hinders economic opportunities in the sector.

Due to gender inequalities in access to education and information, women often

lack the technical skills⁵¹² and knowledge on management practices to improve the quality of livestock.⁵¹³

Women's lower human capital is in turn a barrier to leadership and voice in the sector, as it is used to delegitimise their participation. There is some evidence that interventions focused on capacity building and agency can improve women's status within social groups and allow them to become leaders in the sector.⁵¹⁴

Women are less likely to interact with livestock extension officers, and in turn have less access to relevant information and inputs.⁵¹⁵ An evaluation in SNNPR (Doyogena district) and Amhara Region (Menz Mama and Menz Gera districts) revealed that, while it is women who are more involved in livestock management, it is generally men who interact with (mostly male) extension officers due to prevailing norms and practices of extension services.⁵¹⁶ Lack of access to information constrains women's ability to manage both zoonotic diseases (those transmitted between animals and people) and food safety risks.⁵¹⁷ The evaluation also found that community dialogues have the potential to promote recognition of the value of providing women with information and access to community meetings, while also promoting adoption of better livestock management practices among community members.⁵¹⁸

⁵⁰⁸Kinati (2017 unpublished) in Kinati and Mulema (2019) ⁵⁰⁹Aklilu et al. (2007b) and Aregu et al. (2010) in Kinati and Mulema (2018) ⁵¹⁰Garsow et al. (2022); Management Entity (2021) ⁵¹¹ADCI/VOCA (2021) ⁵¹²Mulema et al. (2017) and Zahra et al. (2014) in Kinati and Mulema (2018) ⁵¹³Obosha (2020) ⁵¹⁴Coppock et al. (2011) in Kinati and Mulema (2018) ⁵¹⁵FAO (2011) and Gammage (2009), in Obosha (2020) ⁵¹⁶Lemma et al. (2019) ⁵¹⁷Garsow et al. (2022) ⁵¹⁸Lemma et al. (2019)

When extension services do target women, they emphasise support in small ruminants and poultry, in line with women's dominant roles in taking care of these animals. However, women are still excluded from other types of extension advice, training or credit⁵¹⁹ which reinforces their segregation in the lower value livestock value chain.

Women are excluded from governance actors such as communal pasture and management institutions. To manage communal pastures, informal institutions are set up. These institutions are a platform to discuss management rules of pastures. However, qualitative data collected from a community in the highlands suggests that the institution is controlled by men, and only women who are heads of household participate in general assemblies. Women members of male-headed households have had little opportunity to share needs and preferences, or to participate in decision making. In addition, both women and poorer households (who own fewer large livestock, in this case oxen) do not benefit equally, as smaller livestock are not allowed to graze on these communal pastures.⁵²⁰

Women tend to be excluded from livestock cooperatives. This is because cooperatives require the registered head of household to join, and this is usually the male spouse.⁵²¹ Married women are also unlikely to

participate in breeding cooperatives, and key barriers to their participation include cooperative leadership's inequitable attitudes towards couples' membership, lack of finance for joining fees, or lower livestock ownership (another cooperative membership criteria), as well as lack of awareness about cooperatives' principles.⁵²²

Women and youth are found in cooperatives for feed processing. These cooperatives are engaged in feed processing for their own use or sale (dairy feed). Some farmers prefer purchasing from women despite the higher cost, as they believe feed from women is of better quality resulting in more milk. Traditionally in Ethiopia, women are believed to be less prone to practising feed adulteration. According to the same source, women are also getting involved in forage instead of vegetable production as the former is more profitable.⁵²³

Women have lower access, ownership and control of livestock resources, including social capital.⁵²⁴ This is often particularly severe for female-headed households, as they may have lost a male connection as well as access to critical resources.⁵²⁵ Livestock resources are interrelated, in the sense that access to one enables access to others.⁵²⁶ For example, farmers who have access to social networks have more access to information and opportunities for technological

⁵¹⁹Mogues et al. (2009) ⁵²⁰Aregu et al. (2016) ⁵²¹Hebo (2014) in Kinati and Mulema (2018) ⁵²²Kinati (2017 unpublished) in Kinati and Mulema (2019) ⁵²³LSIS (2020) in Management Entity (2021) ⁵²⁴Mulema et al. (2017) in Kinati and Mulema (2018) ⁵²⁵Kinati and Mulema (2018) ⁵²⁶Torkelsson and Tassew (2008) in Kinati and Mulema (2018)

adaptation.⁵²⁷ Another example is livestock ownership itself, which may play a dual role as insurance in cases of drought, as livestock is a movable and resilient type of capital.⁵²⁸ At the same time, women's barriers to accessing capital can lead to lower livestock ownership.⁵²⁹

Women face higher barriers to accessing capital or credit from formal lending institutions such as banks.⁵³⁰

Credit services are usually not gender responsive and are generally inadequate for livestock development (small amounts, complex procedures, inappropriate credit services and terms of repayment,⁵³¹ and lack of awareness among producers around available opportunities).⁵³² Farmers often must borrow informally or sell assets to repay loans. Women experience these barriers more acutely than men as they are considered less creditworthy, due to a lack of collateral⁵³³ and therefore obtain fewer loans.⁵³⁴ This excludes them from obtaining assets or services that are important for livestock production or food safety, such as services for refrigerated storage.⁵³⁵

Recommendations

This section highlights sector-specific recommendations, for consideration by public and private sector stakeholders, to improve women's economic empowerment within the livestock sector.

1. Strengthen the livestock sector's commitment to gender equality.

Recommended strategies include:

- Improve internal gender capacity of market actors including gender-related knowledge, attitudes, skills of staff and enhance institutional policies and practices.
- Support industry actors, including international buyers, to commit to policies, regulations and actions that further gender equality, and monitor gender equality commitments.
- Facilitate women's inclusion in value chain governance institutions such as the [Ethiopian Meat-Producer-Exporters Association \(EMPEA\)](#), which currently has an all-male board of directors.

2. Support the rebuilding of livestock-related livelihoods in conflict-affected communities.

Recommended strategies include:

- Work with FAO and other humanitarian actors to supply women farmers living in conflict-affected areas with seeds, livestock and treatment, cash transfers and restocking of veterinary clinics.
- Support pastoralist and agropastoralist communities especially female-headed households therein with cash transfers and exploring livelihood opportunities.
- Where possible and appropriate, in addition to meeting the immediate

⁵²⁷Wondmeh et al. (2014) in Kinati and Mulema (2018) ⁵²⁸FAO (2012) and Njuki & Sanginga (2013) in Garsow et al. (2022)

⁵²⁹Kinati and Mulema (2018) ⁵³⁰Mulema et al. (2017) in Kinati and Mulema (2018) ⁵³¹Obosho (2020) in Garsow et al. (2022)

⁵³²Management Entity (2021) ⁵³³Yisehak, 2008 in Management Entity (2021) ⁵³⁴Obosho (2020) in Garsow et al. (2022)

⁵³⁵Garsow et al. (2022)

needs of conflict-affected communities, integrate strategies in recommendations below to help strengthen community resilience.

3. **Support improved livestock practices through more gender-responsive extension services and community dialogues.**

Recommended strategies include:

- Work with district-level agricultural offices to improve livestock management practices, by specifically targeting women and recruiting women extension agents to deliver training. Train all agents and trainers (men and women) to provide inclusive services and to engage household members who are not the head of the household. Design training (including timing and locations) to ensure accessibility for women around domestic responsibilities. Such training should also include couples.
- Undertake community dialogues to promote recognition and remuneration of the role of women in the livestock value chain, and the importance of their access to information and community engagement, while promoting better livestock management practices among community members.

4. **Support interventions at the household level to increase women's economic, social and human capital.**

Recommended strategies include:

- Carry out household dialogues or other behaviour change interventions that address income negotiation, support women's involvement in decision making around how to spend income and manage livestock that is jointly owned or owned by women.
- Improve women's access to financial capital to grow their business and invest in larger value livestock.
- Ensure that these interventions monitor, track and mitigate any sign of backlash including gender-based violence.

5. **Support women entrepreneurs to invest in and grow livestock businesses.**

Recommended strategies include:

- Support women through leadership training programmes and grants for female entrepreneurs.
- Train women in improved production practices and value-added activities as well as how to market their products and access local markets.
- Promote women role models in the sector through awareness-raising activities.

6. Improve women's human, social and economic capital through cooperatives and collective activities.

Recommended strategies include:

- Promote women's participation in mixed-gender cooperatives, through promotion of inclusive organisational cultures, as well as explicit and intentional strategies, that promote women's participation in leadership, women's voice and participation to decision making, and address discrimination and barriers along the value chain.
- Advocate with existing cooperatives to extend cooperative membership to household members who are not the heads of household.
- Support women to form and join women-led cooperatives, supporting women to organise and access livestock markets that are further away through collective ownership or collective transport.
- Support feed processing initiatives to reduce women's time spent foraging for food for their livestock, as well as poultry value addition activities.
- Ensure that all interventions consider and mitigate risks such as increased unpaid work burden for women.

7. Facilitate women's access to finance through better products and services.

Recommended strategies include:

- Work with financial providers to tailor products and services to women's needs, including utilising mobile money, and tailor communication and marketing strategies to reach women livestock owners and keepers.
- Provide financing to support time-saving technologies, livestock ownership and livestock-specific credit schemes.
- Strengthen private sector partnership for B2B linkages through cooperatives.
- Support private sector involvement for cold chain investment and access to modern processing techniques.

8. Support household- and community-level interventions addressing women's unpaid care and domestic work burdens.

Recommended strategies include:

- Carefully assess the extent to which project activities could increase women's workload, and actively incorporate time- and labour-saving interventions/ technology targeted at women.
- Work with the private and public sectors to ensure that households have access to energy, water, hygiene and sanitation facilities to reduce women's and girls' drudgery and time poverty.

9. Focus on research to fill evidence gaps and build on evidence of what works.

Recommended strategies include:

- Commission and undertake research to understand the gendered impacts of COVID-19 on livestock farming households, and potential climate change adaptations (for example drought-resilient cattle breeds).
- Commission and undertake research to further understand intra-household asset ownership, labour contributions and involvement in management and control of different animals.
- Commission and undertake research on the gendered impacts of milk commercialisation.
- Commission and undertake research to understand gendered challenges and opportunities in livestock industrial processing.
- Commission and undertake participatory research with diverse groups of marginalised women to understand and address barriers across different livestock systems that women may face.
- Ensure all interventions have robust monitoring and evaluation (M&E) frameworks to track change in WEE outcomes, as well as related outcomes including gender-equitable attitudes, norms and gender-based violence.

5.3 The cut flowers sector

Sector overview



Ethiopia's cut flowers production is targeted towards the global demand for premium quality fresh cut flowers for key occasions including Valentine's Day, Women's Day and Mother's Day. In 2020, the country became Africa's second leading flower exporter, after Kenya. Globally, just four countries - Kenya, Ethiopia, Ecuador and Tanzania - account for 98% of the certified Fairtrade flower production.⁵³⁶ At the national level, the sector held a 14.1% share of total exports generating USD422.3 million, an increase from the 9.6% share and USD256.6 million seen the previous year. In fact, export revenues surged by 64% thanks to international prices rising by 0.9%.⁵³⁷

The industry is supported by the Ethiopian government and other development partners, particularly the Dutch government (with the Netherlands the number one export destination for Ethiopia's flowers).⁵³⁸ The sector has shown dynamic growth, driven by incentives from the national government for agricultural investors. Flower growers are offered a 5-year tax holiday, duty-free imports (all goods), access to bank loans and farmland, as well as a full exemption from export customs duties.⁵³⁹ As of 2016, the majority of the flower farms (66 of the 82) in Ethiopia were fully owned by foreign investors.⁵⁴⁰

⁵³⁶BBC (n.d.) ⁵³⁷National Bank of Ethiopia Annual Report (2020) ⁵³⁸Melese (2017) ⁵³⁹AA.com (2015) ⁵⁴⁰Melese (2017)

Although the sector has created employment opportunities for women, the sector's impact on workers' wellbeing, reduction of poverty and gender inequality has been limited.⁵⁴¹ Qualitative research suggests that production practices are not sustainable. The economic benefits of the industry are at the expense of workers' health and safety and economic security. Companies are often unaware of, or flout, safety and environmental codes and conduct (e.g. through the intensive use of toxic pesticides and water, and poor waste management).⁵⁴² There is high labour turnover in the sector, possibly driven by low wages.⁵⁴³ Furthermore, sectoral growth also brings increased risks of land expropriations. In the Oromia Region, for example, 1,487 hectares have been expropriated by the state from Oromia Region farming communities, with little or no compensation.⁵⁴⁴

The flower value chain is shaped and influenced by a range of stakeholders, including foreign investors, the Ministry of Agriculture (sector regulator), input suppliers (seeds, compost, irrigation systems, packaging, phytosanitary products, etc.), flower farms and logistics companies (notably Ethiopian Airlines Cargo who transport fresh cut flowers to European retailers). Some stakeholders carry out programmes specifically aimed at supporting women working in the sector. These include the [Ethiopian Horticulture](#)

[Producer and Exporter Association \(EHPEA\)](#), which oversees the sector, and runs a gender-intervention programme;⁵⁴⁵ the [Fairtrade](#) certification body which supports gender equality in Ethiopian flower farms.⁵⁴⁶ Fairtrade support includes the Fairtrade premium, a sum of money that goes towards a communal fund for workers and farmers to improve social, economic or environmental conditions.⁵⁴⁷

As a direct consequence of COVID-19, the cut flowers sector's revenue fell by up to 80%⁵⁴⁸ as the global demand for flowers declined due to lockdown measures in key European export markets. Closed passageways in Europe and the Middle East disrupted global trade further and large exporters reported a complete halt in activities from April 2020, with all flowers destroyed and used as compost instead.⁵⁴⁹ This situation severely impacted the livelihoods of the workforce especially at the early stages of the supply chain. Suddenly, tens of thousands of workers were sent home on compulsory leave and those on temporary contracts saw their employment end earlier than planned. As flower workers usually earn low wages, they do not tend to build up savings, with women being particularly affected by redundancies.⁵⁵⁰ The widespread job losses were felt in all flower-exporting countries, including Ethiopia.⁵⁵¹ Fairtrade relaxed the rules around spending of the Fairtrade premium, allowing hired labour organisations to make rapid

⁵⁴¹Melese (2019) ⁵⁴²Mengistie (n.d.) ⁵⁴³Staelens and Louche (2017) ⁵⁴⁴Abate (2020); Information from Pathways Study Reviewer/Expert ⁵⁴⁵IDH (n.d.) ⁵⁴⁶Fairtrade Foundation (n.d.a) ⁵⁴⁷Fairtrade foundation (n.d.b) ⁵⁴⁸Reuters (2020) ⁵⁴⁹IGC (2020) ⁵⁵⁰Bhalla, N. & Wuilbercq, E. (2020) ⁵⁵¹Fairtrade Foundation (2020a)

“Security is a serious issue. If there is no peace there is no production, if there is no production there are no exports, if there are no exports there is no money, so everything goes together.”

Source: Representative, Private Company (Flower Exports/Logistics)

exceptional decisions on premium use, without immediately convening a General Assembly of workers, and allowing for 100% distribution of the premium, either in cash or in kind, until the end of 2020.⁵⁵² Beyond COVID-19, Ethiopian flower exporters face key challenges including social unrest,⁵⁵³ inflation (at 34.8% as of September 2021),⁵⁵⁴ and currency exchange fluctuations between the Ethiopian birr and the US dollar.⁵⁵⁵

There is limited evidence and information available on if and how the 2020 to 2022 Tigray conflict impacted the cut flowers sector. However, in response to the conflict, in February 2021, the Tigrayan diaspora launched a social media campaign to boycott Ethiopian roses for Valentine’s Day.⁵⁵⁶

Women’s roles in the cut flowers sector

Of the 180,000 people employed in the sector in 2016, 80% were women.⁵⁵⁷

According to a 2020 study of three farms, most

workers were permanent employees (88%) and 12% of workers were temporary. About 5% had not signed contracts (agreements).⁵⁵⁸

Women workers predominantly work in greenhouses (planting, growing and taking care of flowers) or as cleaners.

Women also participate in scouting, flower transportation and supervision activities. Men tend to work in hand packing, spraying of agrichemicals, irrigation⁵⁵⁹ and in activities that are more physically demanding.⁵⁶⁰ Women are underrepresented in management roles in the sector.⁵⁶¹

Women working in the sector are more likely to be young, single and childless. A study of three farms in northwestern Ethiopia found that 80.5% of women workers were single and did not have children and were willing to work long hours. The average age was just over 24 years old.⁵⁶²

Factors affecting women’s economic empowerment in the cut flowers sector

The following table summarises available data and evidence on key barriers and opportunities for women’s economic empowerment in the cut flowers sector, with further detail on available evidence provided further below.

⁵⁵²Fairtrade Foundation (2020b) ⁵⁵³Reuters (2016) ⁵⁵⁴CGTN Africa (2021) ⁵⁵⁵AA.com (2015) ⁵⁵⁶Eritrea Hub (2021)

⁵⁵⁷EHPEA (2016) in Mengistie (2020.) ⁵⁵⁸Mengistie and Kompuok (2020) ⁵⁵⁹Mengistie and Kompuok (2020) ⁵⁶⁰Mengistie (2020)

⁵⁶¹The Sustainable Trade Initiative IDH (2018) ⁵⁶²Mengistie and Kompuok (2020)

Summary of barriers to and opportunities for women’s economic empowerment in the cut flowers sector

Barriers		
Structural	Normative	Individual
<p>Commitment to increase employment opportunities (Industrial Strategic Plan 2013-2025)</p> <p>2019 Labour Proclamation No. 1156 on discrimination against women</p> <p>Low wages, gender pay gap and poor benefits</p> <p>Temporary workers are most vulnerable to substandard labour conditions</p> <p>Poor regulation and low/noncompliance with labour laws</p> <p>Health and safety hazards</p> <p>Inadequate provision of WASH facilities for health and hygiene</p>	<p>Gender norms drive preference for employing women in the sector, while women underrepresented in management roles</p> <p>Gender-based violence and harassment in the workplace</p> <p>Intimate partner violence</p>	<p>Women’s limited levels of education and training</p> <p>Limited knowledge and access to sexual and reproductive health rights</p> <p>Women’s limited knowledge of occupational safety and labour rights</p> <p>Ineffective labour unions</p>

Summary of barriers to and opportunities for women's economic empowerment in the cut flowers sector

Opportunities and entry points

Structural	Normative	Individual
Implementation of labour laws	Gender-responsive workplace interventions to shift organisational culture, policies and practices	Education and awareness programmes on sexual and reproductive health rights, health and safety
Improvement in social security system, particularly to protect vulnerable workers	Prevention and response to gender-based violence	Gender analysis of access to collective actors
Social and environmental standards and certification programmes		Promoting women's economic and social rights organisations, networks and trade unions

Structural factors

Wages are generally low across the cut flowers sector especially as there is no national standard minimum wage.⁵⁶³ An economic and social assessment found that all respondents were not satisfied with their wages, which was on average ETB18-30 (approximately USD0.90-1.50) for a working day (eight hours) and ETB468-780 (approximately USD24-40) for a month (208 hours). Workers do not earn enough to meet their basic needs. Some growers have developed mechanisms for bonuses and benefits to partially compensate for low wages (transport allowances, benefits for no-absenteeism, productivity and overtime bonuses).⁵⁶⁴

Women in the cut flowers sector earn less than men, on average. A study on workers in the cut flowers and garments and textiles industries found that the average monthly wage was USD46 (ETB1,836), compared to USD67 (ETB2,685) for men. This data is based on responses from 2,353 workers in 106 factories, although it is unclear whether there are differences between the two sectors. Overall, most respondents earned below what was estimated to be a monthly living wage (USD123).⁵⁶⁵ The sector-defined minimum wage in the cut flowers sector is set at USD50, however the NFFPFATU (National Federation of Farm Plantation Fishery Agro Industry Trade Union) found that less educated women often accept less money.⁵⁶⁶

⁵⁶³ Minimum Wage (2023) ⁵⁶⁴ Mengistie (2020) ⁵⁶⁵ Most respondents earn much less than what the Wage Indicator Foundation estimates as a "living wage" for an individual at ETB4,910 (USD123). Hartman and Tijdens (2021) ⁵⁶⁶ Omukhango (2019)

Many flower farms hire some of their workers on temporary contracts. A project by the National Federation of Farm Plantation Fishery Agro Industry Trade Union (NFFPFATU) found that many of the women do not have written contracts or are not permanent workers. Workers are often on rolling temporary contracts, with unpredictable and seasonal working hours, and long working hours.⁵⁶⁷ Un-contracted workers are particularly vulnerable to substandard labour conditions and rights.⁵⁶⁸

Poor regulation creates several other challenges for workers. These include payment delays or deductions, inappropriate punishment, or dismissals, as well as lack of sick leave and safety concerns around travelling home at night. In some cases, these conditions have led to workers' strikes.⁵⁶⁹ A mixed-methods study in northern Ethiopia found that although some flower farms have improved working conditions, wages and unionisation remain low.⁵⁷⁰ Compliance with labour laws is low across the country, in relation to employment security and the right to organise.⁵⁷¹ Similar issues exist across flower industries in East Africa. For example, a cross-country analysis in Ethiopia, Kenya, Tanzania, Uganda and Zambia found that although many farms allow or say that they encourage unionisation, they then discriminate against unionised employees

such as threat of dismissal or denial of access to promotion.⁵⁷²

Health and safety is an area of concern, especially use of chemicals. A mixed-methods study in northwestern Ethiopia found lack of monitoring of workers' health and safety.⁵⁷³ All growers interviewed for an environmental and social assessment reported using pesticides that were either moderately or highly toxic (classes III and II on WHO classification).⁵⁷⁴ The highly toxic pesticides used in this industry can have acute or chronic effects. Risks for workers are exacerbated by inadequate access to quality personal protective equipment (PPE) and inadequate pesticide application instructions; and they include eye problems, skin irritation, headaches and dizziness, breathing problems respiratory problems, miscarriages, premature births and diarrhoea.⁵⁷⁵ Exposure is particularly concerning in greenhouses where women primarily work, where over 200 chemicals are used in enclosed spaces.⁵⁷⁶

Use of pesticides can impact women's reproductive health, but this is under-researched in Ethiopia. According to the WHO (2011), pesticides can cause birth defects and reproductive system damage, as well as cancer and nervous system damage.⁵⁷⁷ Few studies examine the health effects of use of pesticides in this sector, but the ones that

⁵⁶⁷Omukhango (2019) ⁵⁶⁸Mlynska, Wass and Amoding (2015) ⁵⁶⁹Mengistie (n.d.) ⁵⁷⁰Mengistie and Kompuok (2020)

⁵⁷¹Hartman and Tijdens (2021) ⁵⁷²Mlynska, Wass and Amoding (2015) ⁵⁷³Mengistie (2020) ⁵⁷⁴Mengistie (2020)

⁵⁷⁵Dinham (2008) in Mengistie (202) ⁵⁷⁶Sahle and Potting (2013) in Mengistie (2020) ⁵⁷⁷WHO (2011) in Mengistie (2020)

do, suggest that women in the industry report fewer live births,⁵⁷⁸ and that workers have increased risks of chronic cough, shortness of breath⁵⁷⁹ and nasal congestion.⁵⁸⁰ Low use of protective clothing is an important risk factor. Although most workers are provided with protective clothing, up to a third are not and use their own clothes and old and torn gloves. In some cases, personal protective equipment is not used, either because it is uncomfortable, or because it hinders speed. However, there are workers' reports of pesticide-related health symptoms, as well as reports of injuries due to using unsuitable gloves.⁵⁸¹

Other health and safety concerns are related to long hours, lack of transport and poor water, sanitation and hygiene (WASH) facilities. Women working in the sector in northeastern Ethiopia claimed that working is tiresome and done under pressure, with excessive levels of effort demanded.⁵⁸² Long hours of standing in greenhouses can cause swollen feet or kidney problems.⁵⁸³ Half of workers walk home after work, a third use free transportation provided by the farm and the rest use public transport.⁵⁸⁴ Farms lack appropriate WASH facilities. A recent study (2020) found that most workers do not have access to water (65.1%), showers (58.6%) and washing facilities (60%). Soap is also often not provided, so workers who encounter

chemicals and pesticide are unable to wash after work. Toilets generally have dry pit structures and are not maintained regularly.⁵⁸⁵

In response, the sector has adopted a range of private international and national social and environmental standards for cut flower exports.⁵⁸⁶ Ethiopia has also developed its own national code of practice based on other international norms and labels such as EuroGAP and WHO standards and has established a regulatory system to attempt to minimise environmental and social risks. Steps include promoting integrated pest management and the use of environment-friendly agrochemicals by giving incentives to producers, as well as setting minimum wage norms and improved working conditions.⁵⁸⁷ As a result, there have been some improvements in safety conditions. Certifications have been essential to this process.⁵⁸⁸ A number of initiatives address workplace conditions; some examples are presented in the spotlight box below.

⁵⁷⁸Handal and Low (2009) in Mengistie (2020) ⁵⁷⁹These results are from two cross sectional surveys in different farming systems. Negatu et al. (2017) in Mengistie (2020) ⁵⁸⁰Amare et al. (2015) in Mengistie (2020) ⁵⁸¹Mengistie (n.d.) ⁵⁸²Mengistie and Kompuok (2020) ⁵⁸³Workneh (2007) in Mengistie and Kompuok (2020) ⁵⁸⁴Mengistie and Kompuok (2020) ⁵⁸⁵Mengistie and Kompuok (2020) ⁵⁸⁶Mengistie, B. T., Mol, A. P. J., & Oosterveer, P. (2017) ⁵⁸⁷Sourcetrace (n.d.) ⁵⁸⁸Mengistie (n.d.)

Spotlight: Examples of initiatives addressing workplace conditions in the cut flowers sector

The Ethiopian Horticulture Producers and Exporters Association (EHPEA) and other partners along with the Sustainable Trade Initiative, the Floriculture Sustainability Initiative and Business for Social Responsibility together invested in gender interventions through the “Empowering the Source” programme. The programme focuses on supporting flower companies to improve internal practices, strengthen workplace systems (e.g. HR policy, establishing a gender committee) and build capacity to support workers’ needs. An evaluation of the first phase of this programme (2014-2016) found several improvements directly impacting women workers. These have included: the implementation of gender policies and procedures, including grievance mechanisms; improved relationships between workers and managers (through gender committees); implementation of practices around breastfeeding and maternity leave; increased awareness of sexual harassment and sexual and reproductive health, including improved family planning; a reduction in cases of gender-based violence (after an initial increase); better access to first aid and health services; improvements in skills such as self-confidence and negotiation; and a more respectful working culture. Farm data also shows an increase in women in management positions (from 26.3% in 2013 to 36.7% in 2017).⁵⁸⁹

In 2019, Fairtrade launched a project in Ethiopia, a replication of a global initiative that aims to fund, through premiums, projects including adult education classes, free childcare and health checks for industry workers, while supporting general sector improvements in terms of workers’ wages, protection of workers’ rights and reduction in the use of pesticides. Seven farms took part in this initiative to give women equal career opportunities in 2019.⁵⁹⁰ One of these is the [Herburg Roses](#) exporter (a leading Fairtrade exporter), which employs 1,200 Ethiopian workers, 85% of which are women. While most female employees are involved in selecting, picking, sorting and cutting flowers, other higher-level roles occupied by women include Administration Coordinator & Farm Internal Auditor, Head of Finance, and Secretary.⁵⁹¹

The Dutch company [Afriflora](#) regularly sponsors meetings addressing women’s economic empowerment. In December 2020, it launched a free cervical cancer screening programme for female workers,⁵⁹² and in March 2021, it started a programme targeting 1,500 female employees aiming to improve gender inclusivity in flower farming.⁵⁹³

Among key European retailers involved in long-term contracts with Ethiopian flower farms is [Aldi UK](#). As part of its CSR strategy, the retailer maintains a key focus on high standards throughout its supply chain and as a partner of Fairtrade, it aims to empower Ethiopian women in the cut flowers sector with a view to facilitating their assumption of leadership roles at local flower farms.

⁵⁸⁹The Sustainable Trade Initiative IDH (2018) ⁵⁹⁰Fairtrade Foundation (2019a) ⁵⁹¹Herburg Roses (n.d.) ⁵⁹²Afriflora (2020) ⁵⁹³Afriflora (2021)

Normative factors

Gender norms drive preference for employing women in the sector. A Pathways Study interviewee explained that women hold most jobs in the cut flowers sector as it is believed that they are more careful than men in handling and packaging flowers.⁵⁹⁴ However, despite the dominance of women in the sector, women are underrepresented in management positions, and workplace cultures can be highly discriminatory.⁵⁹⁵

Gender-based violence and harassment in the workplace is widespread in the cut flowers sector. A study of 62 farms in Ethiopia and other East African countries found that harassment is driven by coercive labour conditions within global value chains, as well as discriminatory gender relations, with female temporary workers more likely to be targets. The research suggests that action research and organisation of workers has been effective in increasing women's voice, and that another important activity is to ensure the implementation of procedures against sexual harassment.⁵⁹⁶

Limited evidence suggests women who work in the sector, may be at particular risk of experiencing intimate partner violence. An uncited World Bank blog suggests that women who work in the industry are 13% more likely to experience physical abuse, 34% more likely to experience

“There's a gender equality problem - there's sexual violation and harassment on flower farms. It needs attention. We test the women for pregnancy in some departments because it's a difficult task. When they join the department, they are not pregnant, but after some time they fall pregnant, and we don't know if they want it or not. Organisation training [against sexual harassment] is important.”

Source: HR Manager, Private Company (Pathways Study Interview)

emotional abuse, and there is a 32% increase in the number of violent incidents a month for women who work in the sector versus job applicants.⁵⁹⁷ The increase in experience of intimate partner violence is thought to be linked to the transgression of gender norms, with male partners feeling threatened by women's increased income earning, and therefore seeking to reassert their role as head of the household.

There are some positive examples of workplace interventions improving the gender responsiveness of workplace cultures and improving conditions for women workers.

An evaluation of gender-responsive interventions on Ethiopian floriculture farms

⁵⁹⁴Pathways Study Interview with Sector Stakeholder (Private Organisation) ⁵⁹⁵The Sustainable Trade Initiative IDH (2018)

⁵⁹⁶Jacobs, Brahic and Olaya (2015) ⁵⁹⁷Uncited in Goldstein (2012)

found that a combination of strengthening the gender responsiveness of workplace systems (including through establishment of gender committees, training for employers and improved HR policies) as well as building capacities and supporting women workers' needs led to a reduction in reports of gender-based violence. The intervention resulted in more gender-responsive workplaces, with strong gender-related policies and procedures and improved status of women employees.⁵⁹⁸

There are indications that working in the cut flowers sector is associated with a higher risk of domestic violence.

Individual factors

Most women in the sector have limited education and therefore lack other employment opportunities. Most workers in the sector (over 90% in 2013) were unskilled production workers.⁵⁹⁹

Workers have low awareness of labour rights. A survey of three farms found that most (89.3%) farmworkers had no information about the Ethiopian labour codes. Even when workers did have information about the codes, they had no training on labour laws, but learned informally from colleagues or supervisors, or have observed procedures (such as warnings and dismissals of colleagues).⁶⁰⁰

“Most of our employees can't even read and write because when we hire them we don't require a CV or have an interview. The job doesn't require a lot of education. But our company allows the ones who want to learn. We sponsor them so they can learn on the weekend on extension basis and there are some employees who use this chance.”

Source: HR Manager, Private Company (Pathways Study Interview)

Workers' knowledge of and safety practices for occupational hazards is low. A cross-sectional survey of 471 flower farm workers (2017) found low levels of knowledge among workers. It also found that knowledge is positively associated with workers' education, as well as the duration of employment. Both knowledge and use of safety equipment are key factors in implementing safety practices.⁶⁰¹ There is low awareness of sexual and reproductive health (SRH) among workers. Young female workers often have little or no knowledge of, or access to, SRH services, while the demanding working environment may deter them from seeking support. For example, in 2018 there were 10 unwanted pregnancies and three suicides due to these pregnancies at Tana Flora,⁶⁰² a flower farm based in Bahir Dar in Amhara Region, employing 850 permanent workers.⁶⁰³

⁵⁹⁸The Sustainable Trade Initiative IDH (2018) ⁵⁹⁹Suzuki, Mano and Abebe (2017) ⁶⁰⁰Mengistie and Kompuok (2020) ⁶⁰¹Geleta et al. (2021) ⁶⁰²Amref Health Africa (n.d.) ⁶⁰³Gafat Endowment (n.d.)

Although union and association membership is high, many workers are not satisfied with unions' effectiveness.

All growers report having a workers' union, and four out of five workers are members. The efficiency of these unions varies, with some actively working to change working conditions, and others not addressing this at all. The majority of workers (72% of lower certified growers and 64% of higher-level certified farms) were not satisfied with the unions' effectiveness, and lack of action after the initial audit effort to identify issues at work.⁶⁰⁴ According to a women's committee leader, "they push us so much for the audit... but after a while no one remembers it".⁶⁰⁵ It is unclear whether women are more or less likely than men to join a union.

Recommendations

This section highlights sector-specific recommendations, for consideration by public and private sector stakeholders, to improve women's economic empowerment within the cut flowers sector.

1. Strengthen the cut flowers sector's commitments to gender equality.

Recommended strategies include:

- Advocate with government for improved gender-responsive policies in the sector, including upholding women's labour rights (including improved wages) and occupational health and safety.

- Support the sector to improve and uphold social and environmental safeguards and standards, including risk of gender-based violence, through increased monitoring and accountability mechanisms.
- Support the implementation and monitoring of gender commitments of value chain actors, particularly working with international buyers and improving due diligence requirements and processes.
- Support initiatives that promote mutual accountability and transparency in the sector, involving government regulators, farms, buyers and consumers. This could include, for example, information sharing across farms and other local actors, to share learning and monitoring of gender data and indicators; or working with EHPEA, NGOs and unions to continue supporting change at the farm level.
- Improve individual customer awareness in key export markets (e.g. through on-product stickers showcasing gender initiatives in source farms), to increase demand for ethically-sourced gender-supporting flowers.

2. Work with employers to promote gender-sensitive and safe workplaces.

Recommended strategies include:

- Support and implement workplace interventions to improve the gender responsiveness of workplaces. This

⁶⁰⁴Mengistie (2020a) ⁶⁰⁵Mengistie (2020a p.15)

should include training and management of senior leaderships, formation and support to ensure functioning gender committees, as well as targeted support to improve policies and practices.

- Focus on addressing gender-based violence and harassment in the sector, promoting zero tolerance, and establishing anonymous reporting and grievance mechanisms.
- Improve health and safety, for all roles, provide adequate protective equipment (in number and quality), and implement training (in different languages) to improve awareness of safety practices among workers.
- Create facilities for day care and support mothers returning to work including through breastfeeding provisions. Provide facilities or support to address SRH needs.
- Provide safe transport for women workers.
- Work with private sector actors and support unions and associations to negotiate for improved gender-responsive benefits and improved compensation including maternity provisions, transport allowances, benefits for no-absenteeism, productivity and overtime bonuses.⁶⁰⁶
- Implement training and skills acquisition initiatives to support women's progression into supervisory and management roles.

3. Deliver holistic workplace interventions to improve women's human, social and economic capital.

Recommended strategies include:

- Support multi-component workplace training initiatives which aim to improve women's knowledge and skills, social capital, confidence and wellbeing. Women's sexual and reproductive health can provide a useful entry point to work with women on broader issues including gender-based violence and improve awareness of rights.
- Support women to join and participate in unions and associations, including initiatives to increase women's voice and leadership in these collective organisations to improve the gender responsiveness of collective bargaining activities.
- Support leadership programmes to increase the number of women in the sector in leadership positions.

4. Address research gaps and build evidence of what works.

Recommended strategies include:

- Commission and undertake research on the impact of the COVID-19 pandemic on women in the cut flowers sector.
- Commission and undertake research focused on women's participation in supervisory roles, women's participation in union and associations, and access and

⁶⁰⁶Mengistie (n.d.)

- availability of grievance mechanisms.
- Commission and undertake research with marginalised groups (such as women rural-urban migrants, women with physical or other challenges) to understand different barriers and challenges, and to design inclusive interventions.
- Ensure meaningful participation of women in the design of all interventions, including through participatory and action research methods.

5.4 The manufacturing sector

Sector overview



Manufacturing in Ethiopia contributed 5% of GDP (as of 2021),⁶⁰⁷ and just below 5% of total employment (as of 2015).⁶⁰⁸ However, manufacturing exports have been growing (more than elevenfold between 2004 and 2013), and this growth has been largely driven by the leather, textiles and apparel sector.⁶⁰⁹ In 2017, there were 3,627 large and medium-scale manufacturing enterprises employing 293,000 people: 39.4% of them situated in Addis Ababa, 25.9% in Oromia and 13.4% in Amhara.⁶¹⁰

The government has made efforts to industrialise Ethiopia's economy, putting in place policies to develop the

manufacturing sector, for example using industrial parks to attract foreign direct investment (FDI) and to support small and medium-sized enterprises (SMEs).⁶¹¹ These parks are expected to create over 30,000 jobs for young people.⁶¹²

This sector brief focuses particularly on data and insights from food processing and the garments and textiles industries, although information is also drawn from sources that look at manufacturing.

Examples from cotton farming have also been included, as 60% of cotton demand from the textiles industry is met by local cotton production.⁶¹³

Food processing

In 2016, the International Food Policy Research Institute (IFPRI) estimated that food processing employs one million Ethiopians or 2% of the economically active population. A small percentage of these are employed in large companies. As of 2010/2011 about 67,000 people (one third of which were women) were employed in large-scale (over 10 employees) companies.⁶¹⁴ *Enjera*-making enterprises (EMEs) are estimated to employ 100,000 people in urban Ethiopia (mostly women), and their growth responds to increased demand from both foreign markets and local urban consumer food services.⁶¹⁵

⁶⁰⁷World Bank (n.d.b) <https://data.worldbank.org/indicator/NV.IND.MANF.ZS?locations=ET> ⁶⁰⁸World Bank 2015 ⁶⁰⁹UNECA (2016) in UNIDO (2019) ⁶¹⁰Central Statistical Agency (CSA) (2018) ⁶¹¹World Bank (2015) ⁶¹²Gonsamo (2019) in IDRC (2020) ⁶¹³European Commission (2021) ⁶¹⁴Minten et al. (2016) ⁶¹⁵Minten et al. (2016)

Garments and textiles

Ethiopia's textiles industry emerged in 1939 with the Dire Dawa Textile Factory and Augusta Garment Factory. Today, the sector entails spinning, knitting, weaving, finishing and garmenting.⁶¹⁶ The government envisages Ethiopia as the textile and apparel manufacturing hub of Africa with annual exports of USD30 billion by 2025.⁶¹⁷ According to the Ethiopian Chamber of Commerce, the textiles sector consists of 79 mills in Addis Ababa (state of Oromia), 22 mills in the rest of Oromia, seven mills in Amhara, four mills in Afar, three mills in SNNPR, three mills in Tigray, two mills in Dire Dawa and one mill in Gambela producing cotton fibre, yarn, fabrics and garments.⁶¹⁸ In terms of their specific activities, these factories consist of 21 ginning companies, three spinning mills, 18 weaving and knitting mills, 13 integrated mills, 60 garment and seven traditional handloom companies.⁶¹⁹

Female factory workers' rights are protected by the Industrial Federation of Ethiopian Textile, Leather & Garment Trade Union (IFETLG TU), an affiliate of the Switzerland-based umbrella union IndustriALL Global Union,⁶²⁰ with a responsibility for providing training on women workers' rights and addressing issues such as maternity leave, sexual harassment, gender discrimination and equal pay. Global

fashion brands involved in sourcing garments from Ethiopia play a key role in shaping overall working conditions for female factory employees, for example, through the Global Framework Agreements⁶²¹ (GFA) signed in 2015 between IndustriALL Global Union and garment retailers.

Some of the challenges in the sector include the lack of machinery, spare parts and outdated ginneries, as well as cotton quality issues, and uncompetitive pricing from local fields.⁶²² The sector is further challenged by low quality of inputs, limited access to finance, adequate technical skills and infrastructure issues.⁶²³

The 2020 to 2022 conflict in Tigray led to closure of industrial activities in the region,⁶²⁴ and destruction of factories in conflict-affected areas, including in Kombolcha woreda (district).^{625, 626} The situation in Tigray also saw the US suspend duty-free access for Ethiopian goods to the US market effective 1 January 2022, citing lack of compliance with the eligibility requirements for the African Growth and Opportunity Act (AGOA).⁶²⁷

Cotton farming

Cotton farming is one of the oldest fibre crops cultivated in Ethiopia, with cotton mainly produced in the cotton-sesame belt (including Tigray, Amhara,

⁶¹⁶Finishing entails converting woven or knitted cloth into a usable and visually/touch-improved material while garmenting entails production of the final output, adding accessories such as zips, buttons, etc. ⁶¹⁷USDA (2019) ⁶¹⁸Ethiopian Chamber of Commerce (2019) ⁶¹⁹Ethiopian Chamber of Commerce (2019) ⁶²⁰IndustriALL (2019) ⁶²¹IndustriALL (2015) ⁶²²Reuters (2017) ⁶²³World Bank (2018b) ⁶²⁴McBain (2021) ⁶²⁵Information from Pathways Study Reviewer/Expert ⁶²⁶Ethiopian News Agency (2021) ⁶²⁷VOA News (2021)

Benishangul-Gumuz and Gambela regions), SNNPR and the Afar Region.⁶²⁸ In total, 30% of total produce comes from small-scale farms. Demand for cotton has outstripped local supply in recent years, forcing textile factories to start importing. The cotton value chain combines irrigated and rainfed cultivation, and two main sub-chains exist: (i) one based on traditional production, with simpler technologies, limited inputs and extension services; and (ii) one that is modern and mainly controlled by larger farms. The latter supplies the foreign-dominated textiles sector and are the largest suppliers of employment; though often set up in pastoralist or traditional farming areas, their economic returns often fail to optimally benefit local communities.⁶²⁹

Manufacturing and COVID-19

Manufacturing and construction were among the sectors most affected by the pandemic due to links with international markets.⁶³⁰ The pandemic affected sector growth due to movement restrictions around the world and reduced demand for garments. Factory workers, most being women, suffered from unemployment, leave without pay, or reduced salaries.⁶³¹

A survey of firms in Addis Ababa found that 42% of industrial firms halted production and closed in March and April 2020.⁶³² Most manufacturing activities did resume at the

end of the fiscal year with implementation of hygiene and social distancing measures.⁶³³ However, factories struggled to implement measures due to a shortage of protective gear. Some factories attempted to switch production to masks and hospital gowns.⁶³⁴

Women experienced the largest drops in employment rates at the onset of the pandemic.⁶³⁵ In March 2020, 64% of workers that were laid off due to the pandemic were women.⁶³⁶ Moreover, the dip in earnings also appears to have been more severe for female-owned businesses, which generated less than 20% of their previous year's revenue, compared to male-owned business revenue declines of 10%. There was a sharp decline in female employment activities (e.g. the garment industry) leading many to migrate to rural areas to survive, while those who remained in the city faced severe food insecurity.⁶³⁷

From the stakeholder mapping exercise for manufacturing, 69 stakeholders were identified across the various regions of Ethiopia. A summary table of stakeholder types across the regions is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed [here](#) on the Pathways Study website.

⁶²⁸European Commission (2021) ⁶²⁹European Commission (2021) ⁶³⁰Jobs Creation Commission Ethiopia (2020) in IDRC (2020)

⁶³¹ILO (2020b) ⁶³²Abebe et al. (2020) in Sánchez-Martín et al. (2021) ⁶³³Sánchez-Martín et al. (2021) ⁶³⁴ILO (2020) in IDRC (2020)

⁶³⁵World Bank (2020c) ⁶³⁶Abebe et al. (2020) ⁶³⁷Meyer et al. (2020)

Manufacturing Sector Stakeholders

Region	Stakeholder Type				TOTAL
	Private Company	Association, Collective, Organisation	Government Agency/ Department	NGO/ CSO	
National*	2	15	10	3	30
Afar	-	-	-	-	-
Amhara	3	-	3	-	6
Somali	-	-	-	-	-
Oromia	8	-	-	-	8
SNNP	5	-	-	-	5
Addis Ababa	21	-	-	-	21
Sidama	-	-	-	-	-
Gambela	-	-	-	-	-
Benishangul-Gumuz	-	-	-	-	-
Tigray	-	-	-	-	-
TOTAL	39	15	13	3	69

Note: *National stakeholder tally includes global stakeholders, who are assumed to operate at a national scale.

Women's role in the manufacturing sector

Around one in 10 women (12%) who are employed, work in manufacturing.⁶³⁸

Women's participation is increasing, but they are overrepresented in lower-skilled jobs in production.^{639, 640}

Women represent most workers in both food processing and garments and textiles industries as these positions are seen as an extension of women's traditional household/domestic roles. Women are mostly concentrated in the following sub-sectors: garments, textiles, agro-industry processing, food, and beverages, and other limited agro-

processed exportable goods.⁶⁴¹ A Pathways Study interviewee explained that there is typically high demand in textiles for female workers across the sub-sector, from cotton farmers through to female factory operators⁶⁴² and female fashion entrepreneurs.

A third of women who are managers work in the manufacturing sector, but women are generally unrepresented in managerial positions across manufacturing sub-sectors. In total, 34% of women who work at managerial level work in the manufacturing sector, compared to 14% of men.⁶⁴³ However, women are still underrepresented in managerial or higher positions in most manufacturing sub-sectors.⁶⁴⁴ Only 8% of manufacturing firms'

⁶³⁸World Bank (2019b). Compared to 8% of male employees ⁶³⁹Federal Democratic Republic of Ethiopia (2019) in IDRC (2020)

⁶⁴⁰Ministry of Industry (MOI) and UNDP (2018) ⁶⁴¹IDRC (2020) ⁶⁴²Pathways Study Interview with Sector Stakeholder ⁶⁴³World Bank calculation. To note: "The calculations of shares by sector use data on enterprises at the manager level. For managers with multiple businesses in different sectors, more than one sector is recorded. As a result, the sums of the shares from each sector do not equal 100 percent." World bank (2019b) ⁶⁴⁴IDRC (2020)

“Women are disproportionately represented (in the textiles sector) ...it also actually empowers them...because they may not have had other employment opportunities. When we ask, “why do you work here?” they say, “I haven’t finished school”, “I am not married”, “This is the easiest way I can leave my parental home and it’s okay with them because I am making money...I can send them some with a bit of hope”. But at the higher level, women aren’t represented adequately or as managers or supervisors.”

Source: Independent Consultant, Garments and Textiles Sector (Pathways Study Interview)

directors are women. Women are slightly more likely to be a director of a small manufacturing firm (13% are women).⁶⁴⁵ However, a study on women in manufacturing in Ethiopia found that half of women rated their job poorly in terms of career advancement and promotion to managerial positions.⁶⁴⁶

Women are more likely to work in smaller manufacturing firms. A survey that examined manufacturing companies of less than 10 employees (2013/2014) suggests that women make up half of the permanent workforce of

smaller firms (although no data is available for temporary workers). A previous survey that looked at food processing companies of over 10 employees (2010/2011) found that only a third of employees were women.⁶⁴⁷ In small-scale manufacturing, most female workers are unpaid family workers. 58% of women workers are unpaid, compared to 40% of male workers.⁶⁴⁸

Women’s ownership in all manufacturing sub-sectors is lower than that of men. Only 20% of larger firms and 22% of smaller firms are owned by women.⁶⁴⁹ Among food processing companies, only 19% were owned by women. Women owned 17% of textile and 22% of apparel companies. Although ownership in food processing has remained relatively stable, ownership in textile and apparel companies has been gradually increasing.⁶⁵⁰ Women-owned firms tend to be smaller and have lower productivity and profit. Women owners are concentrated in low-productivity, low-technology, low-growth sectors, including the textiles and agro-processing sub-sectors.⁶⁵¹

The manufacturing industry is a driver of rural to urban migration. A study carried out in 2018 found that an average of 62% of women workers migrated from rural areas. Some of the informants consulted for the same study estimate that this is as high as 70% to 90% of the female workforce of new and emerging large

⁶⁴⁵Ministry of Industry (MOI) and UNDP (2018) ⁶⁴⁶Ministry of Industry (MOI) and UNDP (2018) ⁶⁴⁷Minten et al. (2016) ⁶⁴⁸United Nations Entity for Gender Equality and the Empowerment of Women (2014) in World Bank (2019b) ⁶⁴⁹Calculated using the CSA Large and Medium Manufacturing Firms Survey and defining ownership ratio as the number of female owners out of the total number of owners ⁶⁵⁰Ministry of Industry (MOI) and UNDP (2018) ⁶⁵¹Ministry of Industry (MOI) and UNDP (2018)

companies.⁶⁵² However, there's a paucity of supporting services to help these rural women settle in the cities/urban areas.

"... (there's) massive migration of women from rural to urban spaces. Moving from one kebele (municipality) to another in Addis Ababa, you have to inform the kebele that you've now moved in order to get kebele services. These people can't do that... they don't even have an ID....so in the kebele, she is unrecognised. It's the normal Ethiopian girl issues but in the garments and textiles industry, you aren't hiring from the city or people going to college. You are hiring grade 8 girls from the farm. Moving them into the city and expecting them to advance in their employment. In terms of structure and support, a huge amount of work needs to be done around the women that are lost within the industry."

Source: Independent Consultant, Garments and Textiles Sector (Pathways Study Interview)

The manufacturing sector and textiles sub-sector have provided job opportunities and improved income for many women.

Most respondents in a mixed-methods study (2018) reported improved income (78%) and improved standards of living (63%) compared to their previous situation. For those who were previously in unpaid family work and care, or unemployed, almost 90% reported these

outcomes. In addition, almost 60% of men and 63% of women workers expressed satisfaction with their current job and about the same proportion of men and women (>60%) stated that they would still choose to work in the manufacturing sector if they started their career today. Furthermore, a significant portion (52%) expect to remain employed in the manufacturing sector for the next three years. This is consistent with the expectation of both men and women to remain in the industry for the next 15 years on average.⁶⁵³

There is high turnover in the sector, however, with low wages (including the lack of a national standard minimum wage),⁶⁵⁴ and difficult working conditions being the main drivers. Some studies suggest that two thirds of workers had left their job within a year. Reasons for this include to pursue opportunities abroad (e.g. in the Middle Eastern region) where work conditions are believed to be better with fewer health risks. Lack of health and safety measures and lack of ventilation are reported as difficult working conditions by a third of workers.⁶⁵⁵ A randomised controlled trial (RCT) provided randomised job offers to eligible female applicants. Among the sample of 850 women who were newly employed, half soon left their job. Follow-up qualitative research found that salary was a key reason for this choice, as well as health problems (such as kidney issues or body pain) related to the demands of the jobs and the factory conditions.⁶⁵⁶

⁶⁵² Ministry of Industry (MOI) and UNDP (2018) ⁶⁵³ Ministry of Industry (MOI) and UNDP (2018) ⁶⁵⁴ Minimum Wage (2023)

⁶⁵⁵ Ministry of Industry (MOI) and UNDP (2018) ⁶⁵⁶ Halvorsen (n.d.)

Factors affecting women's economic empowerment in the manufacturing sector

The following table summarises available data and evidence on key barriers and opportunities for women's economic empowerment in the manufacturing sector, with further detail on available evidence provided further below.

Summary of barriers to and opportunities for women's economic empowerment in the manufacturing sector

Barriers		
Structural	Normative	Individual
Challenges in implementation and enforcement of labour law	Social norms limit women's opportunities in managerial roles	Women's limited education and skills
Incentives targeting the sector are not gender sensitive	Intra-household dynamics limit women from realising empowering potential of increased income	Women workers have constrained access to networks, mentoring programmes, and unions and associations
Low wages and gender pay gap	Gender-based violence and harassment in factories	Women entrepreneurs have limited access to informal networks and information that would be relevant to their business
Poor health and safety provisions and practices	Safety concerns on way to/from work	Limited access to finance
Lack of job security	Barriers to use of grievance mechanisms	Limited or no savings, (especially among women who work in factories), due to limited earnings
Limited and weak benefits		Women urban migrants face several challenges including lack of safe and affordable housing
Lack of adequate WASH facilities		Women are less represented in trade unions, and they are not effective mechanisms supporting women workers

Summary of barriers to and opportunities for women's economic empowerment in the manufacturing sector

Opportunities and entry points

Structural	Normative	Individual
<p>Commitment to increase employment opportunities (Industrial Strategic Plan 2013-2025)</p> <p>2019 Labour Proclamation No. 1156 on discrimination against women</p> <p>Introducing gender-sensitive incentives for manufacturing sector</p> <p>The Industrial Federation of Ethiopian Textile, Leather & Garment Trade Union (IFETLGTU) working to protect female workers' rights</p>	<p>Improve gender capacity⁶⁵⁷ at the factory level - including shifting organisational cultures</p> <p>Tackling sexual harassment and poor working conditions through social and environmental safeguards</p> <p>Presence of role models and female instructors</p>	<p>Skills building could help improve women's human capital</p> <p>Increasing female workers awareness of labour rights and supporting collective organising</p> <p>Holistic interventions targeting women's individual skills as well as health and wellbeing</p> <p>Entrepreneurs: Financing, allows for access to markets and growth</p> <p>Promoting women's economic and social rights organisations, networks and trade unions</p>

Structural factors

The 13-year Industrial Strategic Plan (2013-2025) seeks to increase employment opportunities for Ethiopians.⁶⁵⁸ The

strategy prioritises labour-intensive, women-dominated sectors, ushering more women into full-time paid jobs. It aims to bring more women not only into low-skilled jobs but also medium- and high-skilled ones.

The Ministry of Women and Social Affairs

(MOWSA), formerly the Ministry of Women and Children and Youth Affairs (MOWCYA), has developed gender-specific policies and strategies aligned with national strategies to increase women's participation within the labour force. These include the National Action Plan for Gender Equality (NAP-GE) and the National Women's Development and Change Package.⁶⁵⁹

⁶⁵⁷Gender capacity refers to the knowledge and skills to engage with gender equality issues. See European Institute for Gender Equality (EIGE (n.d.) ⁶⁵⁸UNIDO (2017) ⁶⁵⁹UNDP (2019) in UNIDO (2019)

Labour Proclamation 377/2003 was introduced by the Ethiopian government, which clearly labels discrimination against women as unlawful.⁶⁶⁰ In a revision in 2011, the country approved a new legal framework regarding social security for government and private sector employees.⁶⁶¹ Benefits for women include 120 days of paid maternity leave.⁶⁶² The replacement for Labour Proclamation 377/2003 known as 2019 Labour Proclamation No. 1156, stipulates clear guidelines to curb workplace sexual harassment and sexual violence,⁶⁶³ and address minimum wage concerns through a Wage Board. In addition to women's maternity leave, the law also introduced paternity leave for three consecutive days for male workers.⁶⁶⁴ As of 2020, the government was working to revise the labour law with a view to improving private sector working conditions.⁶⁶⁵

However, there are challenges with practical implementation and enforcement. These include lack of awareness and effective enforcement, and lack of leadership commitment. This leads to gaps in supporting women's entry in the right sectors, and a substantial gender pay gap.⁶⁶⁶ Qualitative research looking at the working conditions and rights of female factory workers also found that the Ministry of Labour and Social Affairs mandated to regulate labour affairs is not well organised

and equipped, and labour affairs offices are poorly staffed.⁶⁶⁷

Incentives targeting manufacturing are not gender sensitive. A study by the Ministry of Industry (MOI) and UNDP found that the incentives targeting manufacturing and industrial parks were gender neutral and lacked gender-specific support structures (such as day care, gender targeting, or affirmative action provisions) that could increase women's participation and access to benefits from the growing sector.⁶⁶⁸

"...the garment sector imports raw materials and processes it here, using mostly women employees aged 16-24 years old...when I visited Hawassa industrial park two years ago, their salary was ~700 birr (USD198.6) including tax and the industry park gave them food and transportation expenses. The employees told us four of them rent one room for ~1,000 birr (USD283.8). Also, supervisors with a degree were getting lower than any kebele (municipality) employee."

Source: Staff, Government Institution (Pathways Study Interview)

⁶⁶⁰Federal Government of Ethiopia (2004) ⁶⁶¹Federal Government of Ethiopia (2011) ⁶⁶²Federal Government of Ethiopia (2019)

⁶⁶³Includovate (2020) ⁶⁶⁴Global People Strategist (2020) ⁶⁶⁵IDRC (2020) ⁶⁶⁶Education Statistics 2007 in Ministry of Industry (MOI) and UNDP (2018) ⁶⁶⁷Wolde, Alemayehu and Tesfaye (2018) ⁶⁶⁸Ministry of Industry (MOI) and UNDP (2018)

Women in the manufacturing sector earn low wages and a significant gender pay gap exists. Income is low for most workers, particularly women. A third (30%) of women earn less than USD25 (ETB1,300) per month, not enough to cover living expenses. In 2018, women earned 77% of their male counterparts' wages, even when taking education and experience into account.⁶⁶⁹ The average monthly wage for women is less than men (USD46 compared to USD67 for men). Overall, most workers earn below what is estimated to be a monthly living wage (USD124).⁶⁷⁰

Among factors that create difficult working conditions are the high level of movement control within factories, as well as health and safety issues. For example, a qualitative study in selected manufacturing sites found lack of use of personal protective equipment (PPE) appropriate to the nature of risks related to job tasks. Overtime work is common, and women may have limited choice in whether to take this on.⁶⁷¹ Another qualitative study carried out in one factory found that some women had respiratory infections from exposure to dust particles and chemicals. In addition, women's movement was restricted, and they were only allowed one toilet break per day.⁶⁷²

“There is no food supply around, no recreational places for employees and it's not attractive work environment. When they go to the rest room, they will record in minutes. This is difficult especially for females due to natural things like menstruation. We discussed this with top management, but there is still no solution.”

Source: Staff, Government Ministry (Pathways Study Interview)

There is a lack of adequate WASH facilities. One study found that in total, 40% of women reported lack of separate changing rooms, and 33% reported lack of adequate bathroom facilities. The situation improves slightly in industrial parks/zones, however there are reports of bathroom facilities not in use, time restrictions or facilities monitored by male supervisors.⁶⁷³

Manufacturing jobs are seen as temporary safety nets and insecure jobs. An RCT surveyed women from an export-orientated garment factory located outside one of the larger cities in Ethiopia. The study found that women typically prefer informal job opportunities as opposed to low-skilled industrial jobs, with industrial jobs seen as a good short-term safety net rather than a long-term job.⁶⁷⁴ Qualitative research at

⁶⁶⁹Ministry of Industry (MOI) and UNDP (2018) ⁶⁷⁰Most respondents earn much less than what the Wage Indicator Foundation estimates as a “living wage” for an individual at ETB4,910 (USD123). Hartman and Tijdens (2021) ⁶⁷¹Wolde, Alemayehu and Tesfaye (2018) ⁶⁷²Ternsjö (2018) ⁶⁷³Ministry of Industry (MOI) and UNDP (2018) ⁶⁷⁴Blattman & Dercon (2017) in Ternsjö (2018)

manufacturing sites found that women are often told that their contract is fixed term and can be terminated upon expiry. Women respondents believed that employers could terminate their contract at any time, which creates an atmosphere of insecurity and fear of dismissal.⁶⁷⁵

In addition, manufacturing firms do not provide flexibility to accommodate the work-life balance for families and mothers.

Generally, firms offer limited maternity leave contrary to labour law, and company childcare facilities and/or support are lacking,⁶⁷⁶ or where externally available, are unaffordable for most mothers. A qualitative study found that there are some irregularities and violations of the law, in terms of annual leave, sick leave and maternity leave.⁶⁷⁷

Normative factors

Stereotypes around women’s attitudes and skills leads employers to prefer hiring women in manufacturing sub-sectors; however, this does not necessarily translate into increased participation in high-paying jobs or leadership positions.

Biases lead employers to prefer women as they are perceived as faster, quality orientated, careful, trustworthy, dependable, committed, able to work long term in routine jobs, obedient to leadership, able to follow organisational rules and procedures, and more stable than men.⁶⁷⁸ Importantly, the

“At operator level, we hire people found around the village who are educated up to 8th grade. The industry by itself needs women more than men because naturally women are more befitting to the industry. Men start to demand their rights after working for some time in the park, but women are not violent and volatile like men. So they fire men mostly. With our training we can elevate these women to middle level management only such as supervision and quality control. Efficient women may grow in the sector until their education background limits them.”

Source: Staff, Government Institute (Pathways Study Interview)

belief that women will not be as demanding of their rights as men can be a key factor in preferential hiring. Male applicants are instead preferred for physically demanding jobs, as well as managerial and supervisory positions.⁶⁷⁹

Social norms influence women’s opportunities in managerial roles. Reasons given for women’s low representation in managerial positions include society’s perceptions of leadership capabilities of men and women, managers’ beliefs that managerial tasks are difficult for women, as

⁶⁷⁵Wolde, Alemayehu and Tesfaye (2018) ⁶⁷⁶Ministry of Industry (MOI) and UNDP (2018) ⁶⁷⁷Wolde, Alemayehu and Tesfaye (2018) ⁶⁷⁸Ministry of Industry (MOI) and UNDP (2018) ⁶⁷⁹Wolde, Alemayehu and Tesfaye (2018)

well as non-gender-responsive organisational systems and processes.⁶⁸⁰

Taking up employment in manufacturing does not shift intra-household dynamics.

Qualitative research carried out in one garment factory found that although most women reported having made the decision to start paid work by themselves, all those who were married prior to starting work in the industry had obtained permission from their spouse. The research also found that the increase in women's income did not directly shift household norms around decision making. However, many women appreciated the increased freedom of leaving the house whenever they wanted to go to work.⁶⁸¹ An RCT (randomised control trial entailing job offers among eligible female applicants) found that although women who worked in factories enjoyed higher income, this did not influence changes in women's fertility or in decision making within the household.⁶⁸²

Gender-based violence and harassment in factories is prevalent. Qualitative data showed that violence and harassment is prevalent and is usually perpetrated by male supervisors. Bullying and intimidation are common, as is sexual violence and abuse. Some factory workers report that employment decisions are based on physical attractiveness. In some cases, women workers leave employment because of this incessant sexual harassment.⁶⁸³

“... you have Hawassa city having to deal with 30,000 people who moved into the city to work in the industrial parks that have no services for them. So you have the fate of being raped to and from work...people dealing with it are factory managers.

One factory manager called me and said: I have someone that was gang raped. The police said: “since it happened in the industrial park, I can't do anything about it”...they didn't talk to her because it's beyond jurisdiction. She doesn't have kebele (municipality) ID, she doesn't live here etc... then the factory owner tried to get to her to hospital...”

Source : Independent Consultant, Garments and Textiles Sector (Pathways Study Interview)

Safety on the way to work is an increasing concern, in industrial parks. This has worsened in recent years, and, according to both workers and factory managers, safety concerns may be a driver of higher turnover and absenteeism. Industrial parks do not exist within suitable urban eco-systems and lack transport infrastructure or affordable accommodations. This creates conditions for unsafe journeys.⁶⁸⁴

⁶⁸⁰IDRC (2020) ⁶⁸¹Ternsjö (2018) ⁶⁸²Halvorsen (n.d.) ⁶⁸³Wolde, Alemayehu and Tesfaye (2018) ⁶⁸⁴Schaefer and Oya (2019)

Complaints and grievances are rarely brought forward. Qualitative research in manufacturing sites found that women are reluctant to raise claims against employers and do so less than men. This is attributed to “dread of their employer” and the atmosphere of fear that exists in relation not only to press claims against employers to settlement bodies, but also to make complaints against immediate supervisors to the top management. In addition, legal action takes time, money and evidence. Respondents also reported difficulties in obtaining evidence to support their claims, as co-workers are not willing to be named as witnesses and testify for fear of reprisal.⁶⁸⁵

Individual factors

Women workers are generally less educated than men. Primary data collected by the Ministry of Industry and UNDP (2018) found that women in the manufacturing sector are on average less educated than men. Lack of skills, as well as low self-confidence are among the main reasons given to explain women’s underrepresentation in managerial positions. More than half of workers (both men and women) do not receive any in-house training, and when this is offered it focuses on production techniques and does not provide opportunities for advancement. In total, 85% of women workers did not receive any formal training outside of their firm (reasons not discussed in source).⁶⁸⁶

Low level of education access precludes women from alternative paid job opportunities. Women interviewed for a qualitative research study in a garment factory explained that their relatively low level of education was the reason that they did not have better opportunities for paid work. At the same time, a lack of other available options was the primary reason for pursuing work in the industry. Women also considered that in some cases (sewing positions for example), the roles provided opportunities for skills building. Women who had higher education when entering the sector were disappointed by the jobs as they had hoped to make better use of their grade 10 education through more skills-orientated roles.⁶⁸⁷ Furthermore, there are not enough vocational training organisations to support manufacturing skills development.⁶⁸⁸

Women workers have lower access to networks, mentoring programmes, and unions and associations. Social networks in manufacturing (and other sectors that are male dominated) are an enabler of interest in and access to training. Research by the World Bank Gender Innovation Lab indicates that women who took TVET courses in these fields did so mostly because of their existing social networks and exposure to the field.⁶⁸⁹ The World Bank argued that lack of social capital is a key driver of occupational segregation, and that facilitating social

⁶⁸⁵Wolde, Alemayehu and Tesfaye (2018) ⁶⁸⁶Ministry of Industry (MOI) and UNDP (2018) ⁶⁸⁷Ternsjö (2018) ⁶⁸⁸IDRC (2020)

⁶⁸⁹Buehren and Salisbury (2017) in World Bank (2019b)

networks and increasing the presence of role models and female instructors in higher education can support a shift of norms around “men’s work” and create new pathways into lucrative industries.⁶⁹⁰ According to research carried out by MOI and UNDP, lack of women’s networks and mentoring programmes contributes to the lack of support structures where women can voice concerns, as they are already underrepresented in unions and associations, both as members and as leaders. Almost 60% of women reported lack of formal or informal mentoring at work.⁶⁹¹

Information and social networks are important for finding jobs in the first place. Jobs are found either through social networks and word of mouth or going directly to factories.⁶⁹² Job advertisements are not common for blue-collar jobs (where women are concentrated). It can take up to three months to secure employment, and job searching requires time, energy and money. Qualitative research found that it is common for women to gather near workplaces and wait for job offers.⁶⁹³

Women entrepreneurs have lower access to informal networks and information that would be relevant to their business. Key information sharing takes place within informal networks that women have lower access to due to social norms restricting

women’s socialising and networking outside of the home, meaning that women entrepreneurs find challenges in accessing information on buyers and suppliers. Women-owned manufacturing businesses are less represented in sectoral associations.⁶⁹⁴

Although workers do join trade unions, trade union leadership is dominated by men and fails to represent women’s needs. Consequently, women’s special interests tend not to be reflected in the collective bargaining process due to the marginal role that they have in union leadership positions.⁶⁹⁵

Urban migrants face several challenges. Qualitative research in Sidamo zone found that migrant workers face difficulties in accessing decent and affordable housing. Housing costs remain high. Most respondents shared rooms in groups of four or five people, and lived in locations with inadequate WASH facilities, limited infrastructure (health services or transport) and low security. This combination reduces opportunities to form relationships outside of work or to travel outside the city. Difficulties in transferring identification papers to the city, which excludes women who are from urban *kebele* structures, means that some women are unable to access services. Women from groups other than the ethnic Sidamo group reported feeling particularly vulnerable and unwelcome in the city; in

⁶⁹⁰World Bank (2019b) ⁶⁹¹Ministry of Industry (MOI) and UNDP (2018) ⁶⁹²Ternsjo (2018) ⁶⁹³Wolde, Alemayehu and Tesfaye (2018)
⁶⁹⁴Ministry of Industry (MOI) and UNDP (2018) ⁶⁹⁵Wolde, Alemayehu and Tesfaye (2018)

contrast residents of the area are supported by ethnic and religious associations with practical and emotional support, and by their own households with loan provision and protection in the event of sickness.⁶⁹⁶

“...at the moment, I'm not so concerned about the advancement of women. It's more to address the surrounding ecosystem so that they are supported and prepared to withstand pressure they are feeling now and be ready when the opportunity arrives. You have thousands of rural women who have moved to semi-urban spaces around each of these (industrial) parks. They have more pitfalls...are unprepared to manage and that will hinder their growth...”

Source: Independent Consultant, Garments and Textiles Sector (Pathways Study Interview)

Saving is not common among women who work in factories. Although some workers take part in credit and saving associations established by workers or attempt to save through the traditional institution of *iqub* (an association of people having common objectives of mobilising resources, especially finance, and distributing it to members on a rotating basis), or are members of *iddir* (a neighbourhood association that provides

support in cases of death of family members), most workers find saving difficult due to low wages.⁶⁹⁷

For women cotton farmers, challenges are similar to those faced by women farmers in other agriculture sectors. These include: lower access to skills, innovative agricultural inputs and finance; limited ownership and control over productive assets; and difficulties in accessing land.⁶⁹⁸ Women-owned businesses often start with their own financing, as women lack control over land and other assets that can be used for collateral.⁶⁹⁹

Access to market opportunities is in turn linked to financing.⁷⁰⁰ Some initiatives exist to bridge the finance gap. For example, the [Organization for Women in Self-Employment \(WISE\)](#)⁷⁰¹ is designed to promote the economic and social empowerment of women and works with low-income self-employed women including in the textiles and fashion sectors. To date, WISE has supported 44,000 women and girls through 90 savings and credit cooperatives (SACCOs) established in Addis Ababa. These loan services are a key factor supporting WISE's intervention success. In addition, over 5,000 members were supported with literacy and numeracy skills.

⁶⁹⁶Hall - LSE (2019) ⁶⁹⁷Wolde, Alemayehu and Tesfaye (2018) ⁶⁹⁸European Commission (2021) ⁶⁹⁹Ministry of Industry (MOI) and UNDP (2018) ⁷⁰⁰Ministry of Industry (MOI) and UNDP (2018) ⁷⁰¹WISE (n.d.)

Recommendations

This section highlights sector-specific recommendations, for consideration by public and private sector stakeholders, to improve women's economic empowerment within the manufacturing sector.

1. Work with employers to promote gender-sensitive and safe workplaces (e.g. factories).

Recommended strategies include:

- Endorse and implement gender commitments, which should include gender-sensitive policies, staff training, setting up of anonymous grievance mechanisms and establishment of gender committees where women are represented.
- Support and implement workplace interventions to improve the gender responsiveness of workplaces. This should include training and management of senior leaderships, formation and support to ensure functioning gender committees, as well as targeted support to improve policies and practices.
- Focus on addressing gender-based violence and harassment in the sector, promoting zero tolerance, robust policies and procedures, and safe and appropriate grievance mechanisms and reporting procedures.
- Improve pay and benefits to ensure minimum living wages and associated benefits including maternity leave, annual leave and sick leave provisions (including provisions for temporary workers).
- Improve health and safety, for all roles, provide protective equipment and implement training (in different languages) to improve awareness of safety practices among workers.
- Support mothers returning to work through flexible working arrangements, breastfeeding facilities and childcare initiatives.
- Improve WASH facilities and infrastructure, ensuring accessible and working toilet facilities, gender-segregated changing rooms and address associated gender-discriminatory behaviour and policies such as limiting bathroom breaks.
- Work with employers to provide better support to migrant workers including support with local-level ID registration for accessing services.
- Provide safe and affordable transport to/from workplaces.

2. Support women's leadership and voice in the sector.

Recommended strategies include:

- Facilitate women to join and participate in unions and other actors.
- Implement leadership and mentorship programmes to support women to work in supervisory and management roles.

- Improve the gender responsiveness of unions and associations collective bargaining through raising awareness of women's poor working conditions and associated needs.
- Raise women workers' awareness of labour rights through sensitisation activities.

3. Support women entrepreneurs through skills-building programmes coupled with household interventions.

Recommended strategies include:

- Deliver initiatives improving skills, access to innovative agricultural inputs and finance.
- Provide grants to women entrepreneurs to establish and grow businesses.
- Support household level interventions which tackle inequitable norms, attitudes and behaviours hindering women's economic opportunities and wellbeing.
- Promote initiatives that address limited ownership and control over productive assets, including land.

4. Implement holistic skills building and vocational training to improve women's opportunities in the sector.

Recommended strategies include:

- Invest in vocational training programmes and local organisations targeting women.
- Support holistic and rights-based initiatives which combine skills training

with efforts to improve financial literacy skills.

- Support women's access to sexual and reproductive health (SRH) services.
- Support initiatives that link skilled candidates to job opportunities, improve value of employers' initiatives by providing incentives such as "rewards for gender milestone achievements", while monitoring gender targets and number of women obtaining decent jobs.
- Improve the quality of existing higher-level manufacturing education and promote and ensure equitable access for young women.
- Support scholarships or paid apprenticeships for women.
- Support business skills programmes for women entrepreneurs and collectives.
- Support private sector organisations to provide training and access to facilities and products, e.g. financial institutions.

5. Address research gaps and build evidence of what works.

Recommended strategies include:

- Commission and undertake research on the impact of the COVID-19 pandemic on women in the sector.
- Commission and undertake research to better understand gender issues in small-scale cotton farming.
- Commission and undertake research with marginalised groups (such as women

with physical or other challenges and ethnic minorities) to understand different barriers and challenges and to design inclusive interventions.

- Evaluate interventions and include outcomes and indicators related to women's economic empowerment as well as related outcomes linked to experience of gender-based violence and sexual and reproductive health to provide an accurate picture of the impact of any intervention on women's lives.
- Ensure meaningful participation of women in the design of all interventions, including through participatory methods.

6. Strengthen the manufacturing industry commitments to gender equality.

Recommended strategies include:

- Work with key stakeholders to improve gender-responsive incentives and gender-specific support structures at manufacturing and industrial parks (such as day care/crèche services, gender mainstreaming, or affirmative action provisions) that could increase women's participation and access to benefits from the manufacturing sector.
- Advocate with government for improved gender-responsive policies in the sector (including upholding women's labour rights, health and safety) and policies that foster intentional changes for women's economic empowerment in the sector.
- Work with the government to improve implementation of policies and laws in relation to labour rights and decent work conditions, and advocate for ratification of the ILO Violence and Harassment Convention (No. 190).
- Support the implementation and monitoring of gender commitments of value chain actors, particularly working with international buyers and improving due diligence requirements and processes.
- Support and build on initiatives that promote mutual accountability and transparency in the sector, involving government regulators, factories, buyers and consumers.
- Support implementation and improvement of social security mechanisms for manufacturing workers.

5.5 The construction sector - spotlight

Sector overview

- Valued at USD7 billion in 2017 and accounted for 15.9% of GDP (2015/2016 fiscal year). Characterised by a high proportion of micro-entrepreneurs, majority of whom operate in the informal economy.⁷⁰²
- 90% of workers are temporary or daily labourers.⁷⁰³ Informal work is common, and jobs are temporary because they are often linked to the length of the project.⁷⁰⁴ However, no government policies specifically address informality within the construction sector.⁷⁰⁵
- Incidence of workplace injuries is high; a study reported that 38% of workers experienced injuries over a period of one year.⁷⁰⁶
- Construction can be a high-risk environment for gender-based violence affecting community members, workers and service users, especially where there is a large-scale influx of transient male workers into small and often rural host communities.⁷⁰⁷
- The pandemic resulted in scarcity and increasing cost of materials, hard currency shortages, reduced productivity, labour shortages, project delays and additional costs. While most construction activities resumed at the end of the 2020 fiscal year with implementation of hygiene and social distancing measures, almost a third (27.3%) of construction workers reported having lost their jobs.⁷⁰⁸

Women in the sector

- Women are underrepresented in construction; a Pathways Study interviewee suggested that only 10% of construction workers are women, with another suggesting that a maximum 20% of workers are women. Another Pathways Study interviewee explained that construction (especially field/site work) is labour intensive, requires travel and interaction with day labourers, and that these characteristics would make jobs in the sector challenging for women whose daily presence in their households remains crucial to family sustenance.
- According to Pathways Study interviewees, women dominate non-field roles in the construction sector such as marketing and sales activities (lower paid and/or commission-related roles). One company reported that women occupied 75% of staff positions in their sales department (800 people in total). Also, women participate in casual work on construction sites, e.g. carrying building materials including bricks, sand and water,^{709,710} with women generally doing the same work as men (e.g. shovelling sand, sometimes carrying bags of cement, etc., except for the heaviest lifting) though women earn (25%) less than men for the same tasks.⁷¹¹
- In 2014, the number of construction businesses owned by women was 4.7% of those registered with the Ministry of Trade (17 out of 344).⁷¹² Overall, women make up 9% of the construction labour force,⁷¹³ and employers in the construction sector suggest that there is a gendered skills gap.⁷¹⁴ Women who work in construction are more likely to have lower education outcomes.⁷¹⁵ Although women are less likely to have relevant skills, there are few upskilling opportunities on the job.⁷¹⁶ Women are also less represented in TVET courses relevant to construction.⁷¹⁷ Semi-high skills (acquired through TVET) are demanded but there are not enough skilled workers to meet demand.⁷¹⁸
- Women are less represented in the sector,⁷¹⁹ although there may be differences across geographical locations.⁷²⁰
- Literature suggests that the sector is characterised by lack of advancement opportunities for women,⁷²¹ as well as gender pay gap.⁷²² Women are generally hired in low-skilled positions.⁷²³
- Secondary data also highlights that there is hostility towards women, in relation to their need to balance work with household responsibilities.⁷²⁴ There are also reports of exploitation of women workers at construction sites, e.g. lower pay for the same work as men.⁷²⁵

⁷⁰²Veitch (2018) ⁷⁰³Gashahun (2020) ⁷⁰⁴CARE Ethiopia (2018) ⁷⁰⁵Wellington (2010) ⁷⁰⁶Tadesse and Israel (2016) ⁷⁰⁷Social Development Direct et al. (2020) ⁷⁰⁸Sánchez-Martín et al. (2021) ⁷⁰⁹Wellington, J. (2010) ⁷¹⁰Navarro-Astor, E., Román-Onsalo, M., & Infante-Perea, M. (2017) ⁷¹¹Warner, G. (2013) ⁷¹²UN Women (2014) ⁷¹³Construction Industry Training Board [3], in UN Women (2014) ⁷¹⁴ILO (2020) ⁷¹⁵Schaefer and Oya (2019) ⁷¹⁶Wellington (2010) ⁷¹⁷MOE, Educational Statistical Annual Abstract 2004/05 in WABEKBON Development Consultant PLC (2016) ⁷¹⁸CARE Ethiopia (2018) ⁷¹⁹Schaefer and Oya (2019) ⁷²⁰UN Women (2014) ⁷²¹Wellington (2010) ⁷²²Several reports mention this: CARE Ethiopia (2018); Navarro-Astor, Román-Onsalo and Infante-Perea (2016); UN Women (2014); Warner (2013); Wellington (2010) ⁷²³Schaefer and Oya (2019) ⁷²⁴Wellington (2010) ⁷²⁵Wellington (2010)

From the stakeholder mapping exercise for construction, 34 stakeholders were identified across the various regions of Ethiopia. A summary table of stakeholder types across the regions is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed [here](#) on the Pathways Study website.

Construction Sector Stakeholders

Region	Stakeholder Type				TOTAL
	Private Company	Association, Collective, Organisation	Government Agency/ Department	NGO/ CSO	
National*	17	4	8	-	29
Afar	-	-	-	-	-
Amhara	-	-	-	-	-
Somali	-	-	-	-	-
Oromia	-	-	-	-	-
SNNP	-	-	-	-	-
Addis Ababa	4	-	1	-	5
Sidama	-	-	-	-	-
Gambela	-	-	-	-	-
Benishangul-Gumuz	-	-	-	-	-
Tigray	-	-	-	-	-
TOTAL	21	4	9	-	34

Note: *National stakeholder tally includes global stakeholders, who are assumed to operate at a national scale.

Summary of barriers to and opportunities for women's economic empowerment in the construction sector

Structural	Normative	Individual
Barriers		
<p>Challenges in implementation and enforcement of labour law</p> <p>Commitment to increase employment opportunities (Industrial Strategic Plan 2013-2025)</p> <p>Low wages and gender pay gap</p>	<p>Perceptions of construction as not a suitable profession for women</p> <p>Norms around women's mobility</p> <p>Sexual harassment, violence and exploitation of women</p> <p>Women's unpaid care responsibilities</p> <p>Discriminatory attitudes and workplace gender-discriminatory practices</p>	<p>Women's limited educational status and skills - especially related to STEM subjects</p> <p>Women's constrained access to TVET courses</p> <p>Few female engineering graduates</p>

Opportunities and entry points

<p>Advocating for adoption of ILO Violence and Harassment Convention (No. 190)</p> <p>2019 Labour Proclamation No. 1156 on discrimination against women</p>	<p>Engaging with women working in marketing and sales to improve pay and benefits</p> <p>Addressing gender-inequitable attitudes and norms which hinder women's engagement</p> <p>Addressing sexual harassment, violence and exploitation through improving safeguarding standards and practices of industry leads</p> <p>Promotion of women mentors/role models working in the sector to encourage more women to engage</p> <p>Address women's unpaid care burden and address discriminatory workplace hiring practices</p>	<p>Increasing young women's engagement in relevant TVET courses and tertiary education such as engineering</p> <p>Strengthening women's associations and women's engagement in trade unions and other organising bodies</p>
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Recommendations

This section highlights sector-specific recommendations, for consideration by public and private sector stakeholders, to improve women's economic empowerment within the construction sector.

1. Strengthen the construction sector's commitments to gender equality.

Recommended strategies include:

- Support women's leadership in the sector through leadership programmes and targeted support and grants for women entrepreneurs.

"...Families' way of raising kids that discourage girls/women must be improved so that women will be courageous and confident. Women must also operate (bull) dozers and machines. There are many roles that are designated for men only and this must be avoided."

Source: HR Representative, Private Company (Pathways Study Interview)

- Work with government to improve drafting and implementation of policies and laws in relation to labour rights and decent work, equal pay, prevention from employment discrimination, implementation of policies on flexible work and support to families.
- Work with sector stakeholders (including employers) to challenge attitudes towards

gender roles and stereotypes in the sector and promote women's employment in the sector. This could include behaviour change communication (BCC) and promotion of women role models.

- Strengthen sector-wide safeguarding standards, such as promotion of IFC's social and environmental performance standards.
- Address informal work/support informal workers through formalisation, improved worker rights and conditions and social security programmes.

2. Work with employers to promote gender-sensitive and safe workplaces.

Recommended strategies include:

- Endorse and implement gender commitments, which should include gender-sensitive policies, staff training, codes of conduct, GBVH policies, and anonymous grievance and reporting mechanisms.
- Promote gender-sensitive workplaces and organisational cultures, including specific work and training targeting senior leadership.
- Focus on addressing gender-based violence and harassment in the sector, promoting zero tolerance, and address hostility towards women's unpaid care responsibilities, and ensuring safe and effective reporting mechanisms and referral pathways for survivors of violence.

- Support mothers returning to work through flexible work arrangements, day care initiatives, breastfeeding provisions and paid maternity leave.
- Implement initiatives to increase interest in hiring women in non-traditional roles and sectors, including initiatives focused on showcasing women role models and on creation of mentorship opportunities.
- Create opportunities for women to move up to supervisory roles, and support on-the-job training.

“...If we are not improving the social burden on women's life, we won't empower women. For example there was one lady who graduated in management, but her husband prevented her from working and he kept her at home. So we should increase women's awareness and they should be self-motivated too...show works of successful women so other women become motivated. There should be awareness raising programmes which can be by drama, film or with adverts.”

Source: Manager, Industry Association (Pathways Study Interview)

3. Support women in STEM subjects and TVET education.

Recommended strategies include:

- Invest in vocational training programmes and organisations targeting women and girls.
- Focus on skills for roles and sub-sectors where women are less represented, work alongside companies to promote hiring of women and for mentorship opportunities.
- Support initiatives that link skilled candidates to job opportunities, improve initiatives' work by providing incentives such as “payment for results” and monitoring of gender targets and number of people obtaining jobs.
- Improve the quality of existing higher-level STEM education and promote and ensure equitable access for young women.
- Support scholarships and paid apprenticeships for women in the sector.

6. Implications and recommendations

This report has highlighted significant structural-, normative- and individual-level barriers that affect women in Ethiopia's economic empowerment and wellbeing. While significant policy-level progress has been made, the findings highlight that there are deep-rooted harmful practices and norms around unpaid care and domestic work, women's access to vertical social capital, gender-based violence and overarching patriarchal barriers and stereotypes that constrain WEE opportunities. There is a need for further research to understand how gender interacts with other markers of women's identity (such as physical or other challenges, ethnicity, age, etc.) to further constrain their economic potential.

Enabling and improving women's economic opportunities and long-term sustainable value chains involves synergistic and multi-level programming efforts. Programmes that prioritise individual skills gaps along with addressing socioeconomic and psychological norms can influence change across different domains - from household level to societal level. Careful and thoughtful consideration of contextual and normal factors are critical to not exacerbate discrimination.

Investing in women's economic empowerment will have a beneficial impact on both peace and prosperity.

Various internal conflicts including the 2020 to 2022 Tigray conflict and escalating tensions fundamentally impacted Ethiopia's economic recovery prospects,⁷²⁶ and contributed to huge internal displacement, while exacerbating the incidences of violence against women and girls. Addressing the immediate humanitarian needs of conflict-affected communities and displaced people, in addition to efforts to address barriers to women's economic empowerment will be crucial to build community resilience to the lingering impacts of the conflicts and other emergencies (e.g. natural disasters/droughts) in a sustainable manner. Overall, investing in women's economic empowerment holds promising benefits for both peace and prosperity.

The findings highlight significant opportunities to enhance Ethiopian women's economic empowerment and potential. A coordinated, multi-pronged and multi-stakeholder approach must be adopted to address and tackle barriers identified at each level. At the same time, it is critical to recognise what is working within the country, namely programmes with potential for scale and high levels of impact. The following proposed recommendations have been articulated recognising the challenges experienced and successes achieved by the country in strengthening WEE outcomes. It involves engaging policy makers, programme owners and researchers - including those directly working on WEE-focused programmes and initiatives, as well as those involved in broader/synergistic economic development programming, which directly or indirectly impact WEE outcomes. These proposed recommendations can serve as a starting point for further deliberations by multiple stakeholders, including government, to ensure actionable interventions within mutually agreed timeframes.

⁷²⁶Smith, E. (2021)

6.1 Policy and advocacy recommendations

1. Address key policy gaps and improve implementation and monitoring of key legislation around key issues including public procurement, women's land ownership, girls' education and violence against women and girls.

Recommended strategies for consideration include:

- Advocate for legislation on integrating gender responsiveness into the country's public procurement policy, to include provisions to promote and advance gender equality in public procurement policies and practices.
- Strengthen policies, accountability and remediation mechanisms on equal land ownership, sexual harassment and gender-based violence.
- Address factors contributing to policy implementation gaps including improving coordination across agencies and service sectors, assessing policy effectiveness and implementing inclusive policy development processes.
- Strengthen cooperation across central ministries (e.g. MOWSA), supportive NGOs (including the Christian Relief and Development Associations) and international bodies (e.g. ILO, CEDAW) who have arrived at an agreement to mainstream gender.
- Enable and establish supportive frameworks that account for the experiences and recommendations of the women's movements/advocacy groups in the country.
- Ensure effective coordination between the Bureau of Education, Bureau of Health and Bureau of Labour and Social Affairs to build gender-positive programmes and guidelines.
- Ensure effective implementation and monitoring of the Constitution of the Federal Democratic Republic of Ethiopia, Articles 25, 34, 35 and 40 recognising the equality of men and women in all aspects particularly regarding the ownership and administration of personal and common property.
- Advocate for the government to ratify the ILO convention (No. 190) on Violence and Harassment.
- Increase capacity within the Ministry of Agriculture to deliver gender-responsive strategies by building partnership/convergence with other government ministries, and public and private institutions.
- Ensure sufficient legal provisions to protect paid work for women who want to continue to work following childbirth.
- Advocate for and consider setting a standard legal decent minimum wage for the country.
- Pledge and devise strategic plans for full abolition of child marriage and female genital mutilation.

- Advocate for greater public investments and incentives to keep girls in school and encourage more engagement in and completion of science, technology, engineering and mathematics (STEM) subjects/disciplines. Also, advocate for gender responsiveness of policies in the science field, e.g. the National Science Policy and Strategy.

2. Undertake community-level sensitisation, capacity building and advocacy around existing legislation to strengthen women's rights.

Recommended strategies for consideration include:

- Train and build the capacity of key duty bearers including traditional customary structures, local government and law enforcement on key legislation regarding women's right to land ownership, to reduce bias and discrimination against women, and improve transparency and consistency of decision making.
- Design interventions to strengthen capacities of women farmers, pastoralists and agro pastoralists to increase agricultural productivity and benefit from economic activities.
- Prioritise women-led households and facilitate community-level conversations and peer-to-peer training, e.g. with male spouses/male household heads, elders/chiefs, social workers, community health volunteers, teachers and other stakeholders on women's rights and constitutional law.
- Focus on young women and adolescent girls to enable long-term, transgenerational behaviour change and improved educational outcomes.
- Strengthen behaviour-change communication focused on gender-equitable land distribution and inheritance, as well as promoting positive non-violent relationships.
- Implement community-based sensitisation on women's rights, what constitutes child marriage and issues such as gender-based violence (including economic forms), available reporting mechanisms and services outlining obligations of service providers, and where complaints (regarding poor treatment, bribes, or corruption) can be lodged.
- Identify community-based role models to act as champions for behaviour change towards gender equality within communities.
- Introduce strong digitisation efforts that are women orientated and women focused.

3. Advocate to remove gender-based barriers to finance and markets; promote women-friendly financial products and services.

Recommended strategies for consideration include:

- Engage women meaningfully in the design of financial services and products (including mobile money products) to ensure that they are accessible for all women including those most marginalised (such as young women, women with physical or other challenges, rural and illiterate smallholders, etc.).
- Introduce legal and regulatory frameworks that enable women to access credit and criminalise discriminatory practices.

6.2 Programming recommendations⁷²⁷

1. **All programmes should be based on a robust gender analysis which identifies risks and mitigants per proposed intervention.** This is an essential part of good programming for all types of programmes, including those which may not have gender or women's economic empowerment as a core area of focus.

Recommended strategies for consideration include:

- Programmes should also be inclusively designed to cater to the needs, challenges and interests of various groups of women

(e.g. young women, mothers, female heads of households, etc.).

2. Assess and address women's and girls' unpaid care and domestic work burden

so that they can complete their education, acquire marketable skills and work for pay outside the household.

Recommended strategies for consideration include:

- Carefully assess the extent to which project activities could increase women's workload, and actively incorporate time- and labour-saving interventions targeted at women.
- Work with the private and public sectors to ensure that households have access to energy, water, hygiene and sanitation (WASH) facilities to reduce women's and girls' drudgery and time poverty.

3. **Work with and grow women's collectives** to build social, human and economic capital, and tackle normative barriers.

Recommended strategies for consideration include:

- Develop robust frameworks around women's VLSAs to create new and strengthen existing groups.
- Support the formation of new women-led cooperatives with clear succession plans to ensure leadership growth for the youth.
- Ensuring that all work to support agriculture value chains includes a

⁷²⁷For stakeholders directly involved in WEE initiatives and stakeholders involved in general economic development programming not solely focused on women. These stakeholders may be operating at local, national and/or regional levels.

focus on supporting women in product aggregation, to reach more lucrative markets, and receive better prices for their goods. This improves economies of scale and profitability.

- Build disaster and climate-resilient strategies that are adopted and integrated into women's collectivisation.
- Ensure equitable access to productive resources and extension services (including through increasing access to digital solutions).
- Support cooperatives to build connections with financial institutions and other service providers.

4. **Work with women and girls holistically to improve their human capital and wellbeing - building both personal/life skills and business/technical skills.**

Recommended strategies for consideration include:

- Ensure education to employment pathways for adolescent girls and young women are clearly determined - moving from secondary education towards accessing higher/tertiary education opportunities.
- Leverage and strengthen TVET efforts.
- Address barriers to girls' education and factors influencing school dropout. including efforts to improve soft skills around leadership, negotiation and conflict management.

- Target interventions to improve women's voice, decision making and self-efficacy; more equitable norms around leadership and land rights; and opportunities for women to move into new or upgraded roles.
- Provide financial literacy training for women to enable appropriate use of financial services and improved risk management.
- Introduce livelihood diversification opportunities for women including efforts to improve business capabilities, including digital skills.
- Focus on interventions to move women up value chains and into more lucrative/productive sectors, including a focus on building capacity to improve resilience to future economic shocks, and ongoing training.
- Ensure girls and women have access to SRHR services.

5. **Work with large employers to promote gender-sensitive and safe workplaces.**

Recommended interventions for consideration include:

- Strengthen organisations' internal gender capacity⁷²⁸ to improve gender-related knowledge, attitudes, skills of staff and enhance institutional policies and practices.
- Implement workplace empowerment programmes that improve women's

⁷²⁸Gender capacity refers to the knowledge and skills to engage with gender equality issues. See European Institute for Gender Equality (EIGE) (n.d.)

health knowledge and access to goods and services, e.g. SRHR literacy, access to affordable contraception and menstrual health products, as well as financial literacy and training addressing both hard and soft skills.

- Endorse and implement gender commitments, which should include gender-sensitive policies, staff training, codes of conduct and ethics, GBVH policies, and anonymous grievance and reporting mechanisms.
- Focus on addressing gender-based violence and harassment, promoting zero tolerance, and address hostility towards women's unpaid care responsibilities, and ensuring safe and effective reporting mechanisms and referral pathways for survivors of violence.
- Improve working conditions and health and safety for women worker including provision of decent living wages, addressing any gender pay gap, flexible working hours and parental leave.
- Enable digitised wage systems through financial wallets to enable women to receive and control income safely.
- Support policies to proactively procure from women suppliers and women-owned businesses.

6. Address inequitable intra-household dynamics and norms.

Recommended strategies for consideration include:

- Cooperatives, VSLAs and other socioeconomic interventions should consider household approaches which explicitly stimulate discussions, promote gender-equitable attitudes and norms, and support families to negotiate about gender roles and norms which guide intra-household decision making and labour.
- Support livelihoods and economic empowerment initiatives coupled with gender-transformative interventions which increase women's access to and control over economic assets and access to financial services, promote their financial independence, reduce their vulnerability to economic and other forms of gender-based violence and support women's ability to seek services.
- Build on existing efforts to improve understanding of what works to increase women's access to and control over land and other assets.

7. Strengthen public and private sector stakeholder engagement with gender equity.

Recommended strategies for consideration include:

- Incentivise organisations to develop innovative technological and digital approaches that reduce women's burden/drudgery.
- Raise awareness of women's current and potential contribution to value chains,

encouraging recognition and reward of women's labour ensuring that women's positions in the supply chain are made more formal and visible to key actors.

- Establish a mandate for representation of women in leadership positions within private/public sector enterprises.
 - Raise awareness about and accountability for relevant employment law and women employee's rights - including tackling the gender pay gap and workplace-based gender discrimination.
 - Focus on women's workplace conditions - including policies and facilities to be safe, equitable and more favourable for women. Investment in gender-sensitive infrastructure both at the workplace and in the community as part of CSR initiatives.
 - Advocate for gender-positive and inclusive policies and systematic frameworks among SMEs.
- Research to understand barriers faced by the most marginalised groups of women including women with physical or other challenges, and internally displaced women.
 - Studies to understand the effectiveness of previous and current government interventions such as Ethiopia's Growth and Transformation and Industrial Strategic Plan (2013-2015) plans, along with status of implementation/adoption of supportive labour rights proclamations.
 - Commission evaluations of Safety Net Programmes and Social Capital programmes, and their intended impact on women.
 - Execute planned research and survey efforts to draw clear and meaningful insights on women's time use and unpaid domestic and care work.

6.3 Research, monitoring and evaluation recommendations

1. Commission and undertake research to address research gaps including:

- Studies and analysis to understand the impact of the Tigray conflict and other notable internal conflicts on WEE outcomes.
- Studies to understand the dynamics of economic violence such as asset and land dispossession in Ethiopia, as well as what works to prevent and respond to these forms of gender-based violence.

2. Include measures of key factors

enabling or constraining women's economic empowerment including gender-specific measures focused on women's capabilities and agency, household relations and gender norms and attitudes. This should also include tracking signs of potential backlash including increased rates of intimate partner violence.

3. **At a minimum, disaggregate results by gender** and include gender-disaggregated targets. Wherever possible, programmes and research should further disaggregate by other socioeconomic characteristics including income, age, race, physical challenges, migratory status, internal displacement status and geographic location.
4. **Commission mixed-methods research and evaluations** on these issues (i.e. women's capabilities and agency, household relations and gender norms and attitudes, etc.) to understand how and why change happens, and to better understand women's lived realities through participatory qualitative research and theory-based evaluations.
5. **Monitor, track and mitigate against any signs of potential backlash** during programme implementation, including increased rates of violence against women.



Source: Source: Feed the Future.
Photo by Will Baxter/Catholic Relief Services

Appendices

Appendix 1 - Explanation of methodology

Research execution

Scoping study

A scoping study was implemented to guide research fundamentals

Euromonitor International undertook preliminary research to analyse the existing literature on women's economic empowerment in the 13 countries, identify research and data gaps to help develop research objectives/questions and guide the methodology design of the Pathways Study.

Multiple drivers and barriers to women's economic empowerment exist, and the initial scoping research helped identify key commonalities as well as underlying differences across sectors and countries. In agriculture, the role of women within local governance and resource control/distribution structures are critical to success, and cooperatives/collectives have been effective at increasing women's economic outcomes and agency. In non-agriculture sectors, employment segregation and unpaid care work, both usually driven by gender norms,

are key barriers relegating women to certain roles and/or restraining women from certain sectors and/or to lower-paying positions/occupations within sectors.

Additionally, while national institutions are often tasked with addressing women's economic empowerment broadly, local entities and sector-specific organisations are better placed to implement meaningful changes/localised solutions that expand women's economic opportunities in a sustainable way.

Sample findings from scoping study

Shared barriers across SSA		Country-level barriers
Employment concentration in informal, low-wage and low-skilled sectors	Inadequate access to financial institutions and affordable credit facilities	 High fertility/adolescent fertility rates
Employment concentration in administrative positions, low representation in managerial positions	Under-investment in education beyond baseline and primary levels	 Inadequate access to reproductive health/family planning needs
Broad wage gap in both formal and informal sectors	Imbalanced household power dynamics/sociocultural barriers on gender roles	 Low life expectancy/high maternal mortality rates
Under-representation in key growth sectors	Significant time spent on unpaid care work and domestic household chores	 Inadequate access to safe transport
Education and employment discrimination that contributes to employment segregation	Gender norms that limit women's opportunities	

Employment
 Access to resources
 Social and cultural
 Health and safety

Note: Countries listed under the 'country-level barriers' reflect SSA countries (within the scope of the Pathways Study) that experience the highest levels of the listed WEE health-related barriers. These include:

- High fertility/adolescent fertility rates: Angola, Cote d'Ivoire, Nigeria, Senegal, Tanzania & Uganda
- Inadequate access to reproductive health/family planning needs: Angola, Cote d'Ivoire, Ghana, Nigeria, Senegal & Uganda
- Low life expectancy/high maternal mortality rates: Cameroon, Cote d'Ivoire & Nigeria
- Inadequate access to safe transport: Ethiopia, Rwanda, Tanzania & Uganda

Sector selection

In executing the first key objective of the Pathways research programme (“identifying sectors with the most potential to contribute to and benefit from expanding women’s opportunities”), Euromonitor International considered the level of these opportunities, both in terms of potential/scope (reaching majority of women across the country) and in terms of feasibility (ease to expand opportunities). Quantitative and qualitative methods were utilised to ensure a balanced perspective on the sector selection.

Focusing on priority sectors, using economic modelling to tease out the data/quantitative story for women’s economic empowerment

The United Nation’s globally recognised International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)⁷²⁹ was utilised for the definition of sectors. In order to ensure full alignment with other data sources (including Euromonitor International’s Passport database from which other data was sourced), the ISIC’s 21 categories/sectors were consolidated into 14 overall sectors (please refer to Appendix 2 for full definitions). Euromonitor International’s Analytics team analysed historic and current data available at a country level on the main economic

sectors. The team developed forecasts for productivity, employment and women’s economic potential in each economic sector. This modelling used variables including Gross Value Added (GVA) at sector level, Gross Domestic Product (GDP), Employment Data, Capital Data, Demographics Data, sourced from Passport (Euromonitor International’s proprietary database). The analysis also incorporated data from the International Labour Organization Statistical database (ILOSTAT⁷³⁰): (i) Employment data by sex and economic activity; and (ii) Mean weekly hours worked per person by sex and economic activity. The African Development Bank Group (AFDB) database⁷³¹ provided additional input on: (i) GVA from Education, Human Health and Social Work Activities - for Angola, Botswana and South Africa; and (ii) Gross Capital Formation per public/private sector. These metrics were utilised in a model to predict the GVA share from GDP using fixed effect panel data regression. The metrics were also used in another model to assess the benefit of women’s inclusion per sector (using a Cobb-Douglas production function with labour disaggregated by gender⁷³²).

Euromonitor International then developed these findings into a visual scorecard that ranks sectors based on three scenarios: (i) sector performance; (ii) labour opportunity and productivity; and (iii) gender labour gap.

⁷²⁹See https://unstats.un.org/unsd/publication/seriesm/seriesm_4rev4e.pdf ⁷³⁰<https://ilostat ilo.org/> ⁷³¹<https://dataportal.opendataforafrica.org/> ⁷³²The methodology was adjusted based on earlier work by Espinoza, Raphael and Ostry, Jonathan D. and Papageorgiou, Chris, *The Armistice of the Sexes: Gender Complementarities in the Production Function* (June 2019). CEPR Discussion Paper No. DP13792, Available at SSRN: <https://ssrn.com/abstract=3428312>

Scorecard scenarios for ranking economic sectors

Scenario 1:		Scenario 2:		Scenario 3:	
<p>Women's opportunities rest mainly on the sectors' performance: Women will benefit from huge increase of GVA in the most dominant sectors.</p>		<p>Women's opportunities rest mainly on labour performances: Women will benefit from huge increase of labour force and sector productivity.</p>		<p>Women's opportunities rest mainly on the current gender gap: Women can win in sectors where gender gap is high and sectors will highly benefit from female inclusion.</p>	
Rank	Sectors	Rank	Sectors	Rank	Sectors
1	Agriculture, Forestry And Fishing	1	Agriculture, Forestry And Fishing	1	Construction
2	Construction	2	Construction	2	Agriculture, Forestry And Fishing
3	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles	3	Financial And Insurance Activities	3	Financial And Insurance Activities
4	Real Estate Business And Administrative Activities	4	Public Administration And Defence; Compulsory Social Security	4	Real Estate Business And Administrative Activities
5	Financial And Insurance Activities	5	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles	5	Transport Storage And Communication
6	Public Administration And Defence; Compulsory Social Security	6	Real Estate Business And Administrative Activities	6	Public Administration And Defence; Compulsory Social Security
7	Education	7	Education	7	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles
8	Manufacturing	8	Transport Storage And Communication	8	Education
9	Transport Storage And Communication	9	Manufacturing	9	Mining And Quarrying
10	Mining And Quarrying	10	Other Services	10	Human Health And Social Work Activities
11	Other Services	11	Mining And Quarrying	11	Accommodation And Food Service Activities
12	Accommodation And Food Service Activities	12	Accommodation And Food Service Activities	12	Manufacturing
13	Utilities	13	Utilities	13	Other Services
14	Human Health And Social Work Activities	14	Human Health And Social Work Activities	14	Utilities

The scorecard was shared with country working group participants through workshop sessions to ensure that sector selections reflected inputs from country-level stakeholders

In order to ensure a balanced approach to choosing the sectors of focus, Euromonitor International organised “sector selection” workshops per country to discuss the findings from the scoping study and scorecard.⁷³³

Leveraging Steering Committee and partner networks, participants/stakeholders from the private and public sectors of the country were invited to share their feedback on the scorecard sectors and to provide input on sectors/sub-sectors of focus. Country stakeholders' knowledge and experience were incorporated to ensure that the selection of the sectors was contextually cognisant, while considering the informal economy and the socioeconomic, political and cultural

⁷³³This “sector selection” workshop for the Ethiopian Pathways Study occurred in January 2021

factors that are likely to drive women's opportunities. Noteworthy is that country working group participants were aligned with the scorecard ranking of agriculture as a priority (especially livestock and export-orientated commodities). They also flagged the importance of manufacturing (especially garments and textiles) and noted that while construction has untapped opportunities, structural barriers may limit women's meaningful inclusion.

Euromonitor International then conducted additional secondary research to validate the sectors proposed during the workshop in order to develop a matrix of criteria and considerations (see below) to support the final selection of three broad sectors: (i) Agriculture (Coffee, Livestock and Cut Flowers); (ii) Manufacturing (Food Processing, Garments and Textiles, and Cotton Farming as an input supply sector to the garments and textiles sector); and (iii) Construction (a spotlight analysis).

Selection Criteria Deep Dive: Ethiopia

Broad Economic Sector	Specific Sectors/ Commodities (if applicable)	Criteria fulfilled (checklist)						Criteria fulfilled (explanation)	Considerations met & Explanation	Potential Challenges (conducting research in sector + sector-specific)
		1	2	3	4	5	6			
Agriculture	Livestock	✓	✓	✓	✓	✓	✓	Rural + (Peri) Urban interplay. Immediate opportunity.	Young rural women involved. Linkages with related value chains e.g., manure for crop farming.	Competition with use of land for other less environmentally polluting purposes (e.g., farming) and human use (e.g., homes).
	Coffee	✓	✓		✓	✓	✓	Rural and Urban interplay. Medium-term opportunity. Women across ages and education levels involved throughout coffee value chain.	Export opportunity. Regionally specific. 75% of coffee workers are female.	Lack of training and poor access to finance. Land degradation. Unpaid work for many women coffee farmers.
	Cut Flowers	✓	✓			✓	✓	Rural. Medium-term opportunity.	Export opportunity. Young and older women across education levels.	Mainly export-orientated in trade terms.
Manufacturing	Garments and Textiles (including Cotton Farming)	✓		✓	✓	✓	✓	Urban focus. Immediate opportunity. Many textile companies in industrial zone/ parks employing women.	Focused on metro areas.	Women are usually paid low wages and in basic (low skill) roles.
	Food Processing	✓			✓		✓	Rural + Urban interplay. Immediate opportunity.	Food processing is a key focus of the national development plan.	Poor access to finance (start-up capital).
Construction	Engineering and Design	✓			✓	✓	✓	Urban focus. Immediate opportunity.	Normally representative.	Educational segregation as few(er) girls/women study engineering.
	Construction Labour and Management	✓	✓		✓	✓	✓	Urban focus. Long-term opportunity.		Unclear entry points to approach sub-sector.

Criteria

1. Incorporating informal economy

2. Ability to effect change

3. Women's preferences & agency

4. Alignment with govt strategy/national devpt plan

5. Timescale of intended impact + sector potential

6. Scorecard priority

Stakeholder mapping

The research team identified key WEE stakeholders in relevant sectors mainly via desk research and supplemented with interviews. The research team then mapped these stakeholders per location (region/province/state) in the country

The research team (Euromonitor International and country research partners) used desk research and targeted outreach and interviews to identify and map key stakeholders playing a key role in women's economic empowerment within each sector. The objective of this mapping was twofold: (i) to identify key stakeholders - public and private per sector in each country, their operations within the supply/value chain, key projects/initiatives, any key provisions for women (e.g. membership, leadership, gender-focused programmes, etc.) and their impact on women's economic empowerment; and (ii) to identify potential stakeholders to be interviewed for the Pathways Study.

This mapping produced ~170 stakeholders in Ethiopia across the three focus sectors:

(i) Agriculture (Coffee, Livestock and

Cut Flowers); (ii) Manufacturing (Food Processing, Garments and Textiles, and Cotton Farming as an input supply sector to the garments and textiles sector); and (iii) Construction. These stakeholders included: (i) sectoral structures (associations, cooperatives and collectives, organisations and representative bodies); (ii) government ministries, departments and agencies; (iii) private companies; and (iv) non-governmental organisations - NGOs (international and country). Please refer to the [Pathways Study website](#) for the full mapping of stakeholders.⁷³⁴

Interviews

The research team conducted interviews with key stakeholders to dive into women's roles per sector, including the drivers and challenges faced and future opportunities

The research team for Ethiopia conducted a total of 47 in-depth interviews with stakeholders including cooperatives/collectives, industry associations, private companies and public entities.

Interviewee Type	Agriculture	Manufacturing	Construction
Cooperative/Collective	2	-	-
Government	1	3	2
Industry Association	3	1	3
Private Company/ Organisation (incl. Independent Consultants)	10	7	15
Total	16	11	20

⁷³⁴Stakeholder listing is based on secondary research and interviews, so all stakeholders (especially those with highly localised and/or offline operations) may not have been captured in the listing. All maps and tables present best-available information and can be updated as new information is received

The objective was to discuss women's participation in the specific sectors in Ethiopia, the key drivers/barriers to expanding women's opportunities and the actionable steps to getting there. The questions were structured into three broad themes/objectives (examples of broad topics discussed per theme below):

1. Sector overview and trends

- What are the sector's drivers and constraints - generally and for women specifically?
- How does the sector provide opportunities for achieving sustainable employment and/or sustainable livelihoods?

2. Current status of women in the sector

- What types of positions/jobs do women hold (formal and informal)? Why?
- What are the drivers of and barriers to women's (increased) economic participation in the sector (employment, entrepreneurship, career advancement, etc.)?

3. Future opportunities for women in the sector and actionable solutions

- What type of roles/positions/jobs/opportunities (including self-employment) can women target? How? What is needed to support them?
- What are the current solutions being implemented?
- Are there any other solutions not yet being implemented that may improve women's economic participation in the sector?

- Who are specific key stakeholders crucial to implementing identified solutions?

Analysis and reporting

Findings from primary and secondary sources were analysed and developed into a report (including actionable recommendations) which was reviewed by multiple stakeholders/partners

The research team then analysed data and insights collected from secondary and primary research to produce key findings and proposals to improve women's economic opportunities. Key drivers and barriers plus preliminary recommendations were then developed for discussion/elaboration with country working group participants in a "developing recommendations" workshop facilitated by Euromonitor International.⁷³⁵ This was in order to integrate their expertise and knowledge of the country's context into the analysis and to ensure the final recommendations are tailored, relevant and feasible for women in the country.

Feedback from country working group participants was then incorporated ahead of sharing the draft reports with key stakeholders (sector experts, thematic experts, Pathways Study Steering Committee) for validation, and working with Kore Global for finalisation.

⁷³⁵This "developing recommendations" workshop for the Ethiopian Pathways Study occurred in June 2021

Appendix 2 - Sector classification

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
1	Accommodation and Food Service Activities	This category corresponds to Section I of the International Standard Industrial Classification (ISIC Rev. 4), and comprises units providing customers with short-term lodging and/or preparing meals, snacks, and beverages for immediate consumption. The section includes both accommodation and food service activities because the two activities are often combined at the same unit.
2	Agriculture, Forestry and Fishing	This category corresponds to Section A of the International Standard Industrial Classification (ISIC Rev. 4), and covers the exploitation of vegetal, animal and fish natural resources. The section comprises the activities of growing crops, raising animals, harvesting timber and harvesting other plants and animals from a farm or their natural habitats. Fishing is defined as the use of fishery resources from marine or freshwater environments, with the goal of capturing or gathering fish, crustaceans, molluscs and other marine products (e.g. pearls, sponges, etc.).
3	Construction	This category corresponds to Section F of the International Standard Industrial Classification (ISIC Rev. 4), and includes general construction and special trade construction for buildings and civil engineering, building installation and building completion. It includes new work, repair, additions and alterations, the erection of prefabricated buildings or structures on the site and also construction of a temporary nature.

Overall Sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
4	Education	This category corresponds to Section P of the International Standard Industrial Classification (ISIC Rev. 4) and includes public as well as private education at any level or for any profession, oral or written as well as by radio and television or other means of communication. It includes education by the different institutions in the regular school system at its different levels as well as adult education, literacy programmes, etc. Also included are military schools and academies, prison schools, etc., at their respective levels.
5	Financial and Insurance Activities	This category corresponds to Section K of the International Standard Industrial Classification (ISIC Rev. 4) and comprises units primarily engaged in financial transactions, i.e. transactions involving the creation, liquidation or change of ownership of financial assets. Also included are insurance and pension funding and activities facilitating financial transactions. Units charged with monetary control, the monetary authorities, are included here.
6	Human Health and Social Work Activities	This category corresponds to Section Q of the International Standard Industrial Classification (ISIC Rev. 4) and includes the provision of health care by diagnosis and treatment and the provision of residential care for medical and social reasons, as well as the provision of social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and childcare to those requiring such assistance. Also included is the provision of veterinary services.
7	Manufacturing	This category corresponds to Section C of the International Standard Industrial Classification (ISIC Rev. 4) and includes: manufacture of food, beverages and tobacco; textile, wearing apparel and leather industries; manufacture of wood and wood products; manufacture of paper and paper products, printing and publishing; manufacture of chemicals and chemical petroleum, coal, rubber and plastic products; manufacture of non-metallic mineral products, except products of petroleum and coal; basic metal industries; manufacture of fabricated metal products; other manufacturing industries.

Overall Sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
8	Mining and Quarrying	This category corresponds to Section B of the International Standard Industrial Classification (ISIC Rev. 4) and includes the extraction of minerals occurring naturally as solids (coal and ores), liquids (petroleum) or gases (natural gas). Extraction can be achieved by underground or surface mining or well operation.
9	Other Services	This category corresponds to Sections R, S, T and U of the International Standard Industrial Classification (ISIC Rev. 4) and includes services provided by businesses and government units to individuals, other businesses or the community as a whole, activities within households, where the same household is the consumer of the products produced.
10	Public Administration and Defence; Compulsory Social Security	This category corresponds to Section O of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities normally carried out by the public administration. However, the legal or institutional status is not, in itself, the determining factor. This division includes units that are part of local or central public bodies that enable the administration of the community to function properly. The section includes general administration (e.g. executive, legislative, financial administration, etc., at all levels of government) and supervision in the field of social and economic life; defence, justice, police, foreign affairs, etc.; management of compulsory social security schemes.
11	Real Estate Business and Administrative Activities	This category corresponds to Sections M, N and L of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities that focus mainly on the business sector with the obvious exception of real estate activities.

Overall Sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
12	Transport Storage and Communication	This category corresponds to Sections H and J of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities related to providing passenger or freight transport, whether scheduled or not, by rail, pipeline, road, water or air; supporting activities such as terminal and parking facilities, cargo handling, storage, etc.; postal activities and telecommunication; renting of transport equipment with driver or operator.
13	Utilities	This category corresponds to Sections D and E of the International Standard Industrial Classification (ISIC Rev. 4) and covers the activity of providing electric power, natural gas, steam supply and water supply through a permanent infrastructure (network) of lines, mains and pipes.
14	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	This category corresponds to Section G of the International Standard Industrial Classification (ISIC Rev. 4) and includes wholesale and retail sale (sale without transformation) of any type of goods and rendering services incidental to the sale of merchandise. Wholesaling and retailing are the final steps in the distribution of merchandise. Also included in this section are the repair of motor vehicles and the installation and repair of personal and household goods.

Appendix 3 - Cross-sectoral summary of barriers and opportunities and entry points

Structural Barriers	Coffee	Livestock	Cut Flowers	Manufacturing	Construction
Customary laws and practices restricting: (i) women's land ownership/holding rights (and enforcement); and (ii) women entrepreneur's access to rented land (e.g. as working premises in the manufacturing sector)	✓	✓		✓	
Limited gender capacity ⁷³⁶ across key value chain actors	✓	✓	✓	✓	✓
Low wages, gender pay gap and inadequate enforcement of labour laws	✓	✓	✓	✓	✓

Opportunities and Entry Points - Structural	Coffee	Livestock	Cut Flowers	Manufacturing	Construction
Existence of cooperatives, associations and networks that challenge barriers and leverage drivers	✓	✓			
Leverage existing initiatives, including land certification programmes, agricultural extension services and initiatives working to build specific skills (such as agronomy) among women in the sector	✓		✓		
Women's Development and Change Strategy (WDCS)	✓	✓	✓	✓	✓
Improvement in social security system, particularly to protect vulnerable workers	✓	✓	✓	✓	✓
Commitment to increase employment opportunities (Industrial Strategic Plan 2013-2025)			✓	✓	
2019 Labour Proclamation No. 1156 on discrimination against women	✓	✓	✓	✓	✓

⁷³⁶ Gender capacity refers to the knowledge and skills to engage with gender equality issues. See European Institute for Gender Equality (EIGE) (n.d.)

Normative Barriers	Coffee	Livestock	Cut Flowers	Manufacturing	Construction
Gender norms restricting women's place in the value chain	✓	✓	✓	✓	✓
Employment gender segregation	✓	✓	✓	✓	✓
Unpaid care and domestic work burden	✓	✓	✓	✓	✓
Restrictions on mobility and limited access to markets	✓	✓	✓	✓	✓
Gender-based violence - including intimate partner violence (IPV) and violence and harassment in the workplace	✓	✓	✓	✓	✓

Opportunities and Entry Points - Normative	Coffee	Livestock	Cut Flowers	Manufacturing	Construction
Working with communities to tackle gender inequalities	✓	✓	✓	✓	✓
Promoting more gender-equitable intra-household decision making	✓	✓	✓	✓	✓
Promoting women's economic and social rights organisations, networks and trade unions	✓	✓	✓	✓	✓
Increasing women's access to markets through cooperatives	✓	✓			
Prevention and response to gender-based violence (including economic forms)	✓	✓	✓	✓	✓
Interventions aimed at reducing women's unpaid care burden and redistribution of household care and domestic responsibilities	✓	✓	✓	✓	✓

Individual Barriers	Coffee	Livestock	Cut Flowers	Manufacturing	Construction
Women's limited ownership of land and restricted access to land and farming equipment	✓	✓			
Women's constrained control over income	✓	✓	✓	✓	✓
Women's limited access to and engagement in cooperatives, e.g. married women are excluded from livestock cooperatives as only heads of households can participate	✓	✓			
Constrained access to extension workers, and few extension workers are women	✓	✓			
Women's limited decision-making power in the household	✓	✓	✓	✓	✓
Limited access to informal networks and information that would be relevant to their business	✓	✓			
Limited access to finance and credit	✓	✓	✓	✓	✓
Women's constrained savings	✓	✓	✓	✓	✓
Women's limited human capital including lower educational outcomes compared to men	✓	✓	✓	✓	✓

Opportunities and Entry Points - Individual	Coffee	Livestock	Cut Flowers	Manufacturing	Construction
Working with cooperatives to expand opportunities to women, e.g. accessing business development services, increased market access, etc.	✓	✓			
Improving women's targeted access to extension services and training, while increasing female representation in agricultural extension services	✓	✓			
Holistic interventions which tackle women's education and skills, while building self-confidence and self-efficacy	✓	✓	✓	✓	✓

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Limitations of Research

The Pathways Study is subject to the following research limitations, related to both the scope and timing of the study. The most important of these are captured below, but this list may not be exhaustive.

NOTE: Research design for the Pathways Study was completed in mid-2020, ground-level econometric data forecasting was completed in late 2020, fieldwork was carried out over January to June 2021 and the reports were prepared from then into 2022.

Evolving Topics/Input – General Factors and External Events

- Country policies are live guidelines which are periodically updated. The Pathways Study focuses on policy provisions and/or omissions for women's economic empowerment (WEE); its core focus has not been on analysing policies (e.g., the learnings, adjustments, and impact over time). Rather, the gendered linkages are the key focus of the Pathways Study.
- A qualitative inquiry about the impact of the COVID-19 pandemic on women's economic empowerment across sectors was incorporated into fieldwork and reports. However, given the research timing, at the beginning of and during the pandemic, new insights on its impact continue to emerge and could not be fully captured.
- The Pathways study recognises the importance of climate change, with broad impact that varies by sector, commodity, and gender, amongst other factors. While this did not form the focus of this study, the research explores its broad effects on the economy and (women in) agriculture and proposes relevant recommendations (e.g., climate-smart interventions) while also recognising recent country measures to integrate gender into the climate change agenda.
- Similarly, the ongoing conflict between Russia and Ukraine has impacted various sectors globally including in Sub-Saharan Africa. There is no doubt that the geopolitical challenges and supply chain disruptions have an impact on women's economic opportunities. However, this is not captured in the report as the Russia-Ukraine war started after data collection was completed.
- Gender-based violence (GBV) harms many women and girls across Sub-Saharan Africa and beyond. The Pathways Study reports cover GBV under Normative barriers (sub-section 4.2.3) and highlight its different forms. Beyond analytical findings, some specific recommendations (across policy/advocacy, programming and research) are made to tackle GBV on a sectoral basis, which was the research focus. However, tackling GBV in girls and students requires specific inquiry and responses which go beyond the scope of this study.

Other Topics

Most recommendations are made without reference to specific stakeholders (e.g., faith-based groups, interest-based groups). The operations and belief systems of this rich variety of potential stakeholders also varies across the 13 countries covered. The Pathways Study sought to make recommendations relevant to all stakeholders involved in policy development and programming, regardless of their specific areas of application.

