

► **Gendered employment analysis and policy
recommendations in Ethiopia**

Evidence from Hawassa and Yirgalem
Integrated Industrial Parks

UN Women - ILO Joint Programme

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Key points

- The main objective of the study was to identify specific needs and barriers affecting women's employment in the garment and agro-processing subsectors in the Hawassa (HIP) and Yirgalem (YIAIP) Integrated Industrial Parks to inform sectoral and industrial policy options that could address gender-based discrimination.
- Gender-based horizontal and vertical segregation appears to be linked to both explicit and implicit constraints that limit women's participation in the labour market
- Women are not only under-represented in paid employment, they also work shorter hours in paid employment compared to men due to time constraints related to unpaid domestic and family care responsibilities
- Women are largely under-represented in higher-level occupations and over-represented in low-skill, low-productivity and low-paid occupations with limited opportunities for promotion and career progression.
- After identifying the key barriers to women's employment, intervention areas are suggested which are organized in seven pillars. These comprise policy and regulatory measures, competence and skills building, awareness raising, wages and incentives, support centres and tangible commitment, facilities and coordination, and social dialogue

► I. Introduction¹

Ethiopia has made significant socio-economic progress over the past two decades through public-led investments in economic and social sectors as well as in physical infrastructure. However, the pace of growth acceleration slowed to less than 7 per cent, on average, in 2018–21 compared to the 10 per cent average growth seen during the period 2003–17. The growth deceleration in recent years is due to overlapping shocks, including conflicts and instabilities, the COVID-19 pandemic, global geopolitical tensions (such as the Russia–Ukraine war, which caused renewed trade disruptions), rising prices of food, fuel and fertilizer, and climate-induced drought and other factors, which have created a drag on the country's growth prospects (Ferede and Adane 2022).

The multiple shocks exacerbate the gender disparities in labour market outcomes. The economy is failing to generate sufficient job opportunities for the growing labour force, reflected by the large number of people, especially women, left without work. When women are in work, they usually have low-quality, low-productivity jobs. In Ethiopia, gender disparities in employment and earnings mainly emanate from women's limited participation in the formal labour market, due to factors related to gender segregation, cultural and family responsibilities, and differences in the level of human capital, among others (Abegaz and Nene 2023; Mulugeta 2021). Not only is the participation of women in wage employment lower compared to men but there are also significant wage and productivity gaps as well as segregation of female workers into low-paying firms (Abegaz and Nene 2023). Berga and Abdisa (2022) found a significant wage gap of

¹ The study on gendered employment analysis in Ethiopia was prepared with support from the International Labour Organization (ILO) staff both in Ethiopia and at ILO headquarters in Geneva, Switzerland. In particular, the author wishes to thank Mr Dereje Alemu for his robust administrative support and Ms Valeria Esquivel and Mx Luis Felipe Velázquez for their overall strategic and technical guidance, in addition to providing detailed comments and suggestions at different stages of the study. I would also like to thank Dr Zerihun Kebede, adviser to the Ministry of Women and Social Affairs, for providing detailed comments on an earlier version of the report.

Appreciation also goes to Mr Zewdie Adane for the superb support in coordinating the fieldwork and providing substantive technical inputs. Appreciation goes to Ms Blen Tilahun for successfully coordinating and organizing the validation workshop held on 25 September 2023. Finally, the author would like to thank the management teams of the Hawassa Industrial Park (HIP) and Yirgalem Integrated Agro-Industrial Park (YIAIP), fieldwork facilitators, key informants and workers for providing pertinent information and support during the implementation of the fieldwork.

62.7 per cent. Factors responsible for the observed wage gap include age, education, religion, marital status, household headship, wealth and occupation.

More recent global estimates also show sizable gender gaps in Ethiopia despite encouraging progress. Ethiopia ranked 75th out of 146 countries globally and 13th in the sub-Saharan Africa region in terms of gender parity in the 2023 edition of the *Global Gender Gap Report* (WEF 2023). Unpacking the gender gap index provides useful insights into the extent of gender gaps along the different dimensions of the index. While Ethiopia performed better in the categories of health and survival, the country lags in educational attainment (ranked 135th) and in economic participation and opportunities (ranked 116th). Women's low educational attainment and limited participation in economic activities result in low earnings, with women earning just two thirds of the wages that men earn (WEF 2023). More worryingly, the report also indicates that women held only a quarter (25.4 per cent) of senior positions and a third (34.3 per cent) of technical posts. This under-representation of women in wage employment and over-representation in low-productivity jobs requires a rigorous assessment of the underlying causes and barriers to guide evidence-based, gender-sensitive, gender-inclusive and proactive interventions for inclusive and sustainable development going forward.

Both Ethiopia's Ten Years Development Plan and its Industrial Development Strategy 2002² focused on labour-intensive and export-oriented manufacturing industries. The Government identifies job-rich manufacturing industries, such as food processing, textiles and garment and leather industries, as its priority target areas (Ministry of Planning and Development 2021). Ethiopia has invested in industrial parks to enhance the country's structural economic transformation through promoting technological learning, attracting investment, forming linkages with the wider economy and boosting decent job creation (FDRE 2015). The parks are mainly designed for textile and garment and agro-processing industries. However, despite inspiring stories about the expansion of industrial parks, concerns remain, especially from a decent work perspective in female-dominated manufacturing industries.

The UN Women-ILO Joint Programme promoting decent employment for women aims to facilitate the adoption of gender-equitable inclusive growth policies and investments in the care economy through the following steps:

- i. Evidence-based policy analysis and advocacy, technical advice and capacity strengthening to create political consensus for the adoption of macro-level economic policy accelerators for gender-equitable, inclusive growth and better jobs.
- ii. Policy advice, capacity development and technical support to (a) enhance the adoption of sectoral and industrial policies that tackle occupational and sectoral segregation and facilitate women's access to decent employment opportunities; and (b) ensure that investments in care services provision are costed, financed and implemented.

A recent assessment commissioned by the ILO provides a snapshot of the employment content of sectors and subsectors using a social accounting matrix-based multiplier analysis (Woldeyes 2022). However, the findings of the study need to be complemented by an in-depth assessment that investigates the factors influencing occupational and sectoral segregation and identifies interventions to enhance access to decent employment opportunities for women. Findings from this study are expected to contribute to raising awareness about gender gaps in strategically critical productive sectors as well as generating concrete actions to facilitate the adoption of gender-responsive sectoral and industrial policies for decent employment creation for women in Ethiopia.

This assessment report aims to identify specific needs and barriers relating to women's employment in strategic productive subsectors to inform sectoral and industrial policy options that could address gender-based occupational and sectoral segregation. Specifically, the aim of the research was to:

- i. identify two sectors/subsectors with significant potential to generate high productivity work opportunities, with synergies, for women;
- ii. develop a mixed-methods approach to inquire into the explicit and implicit barriers to women's employment, permanence within the workplace and career progression in the identified (sub)sectors;

² The Industrial Development Strategy is being updated to include recent and emerging developments but is yet to be endorsed.

- iii. identify the causes of gender-based sectoral and occupational segregation; and
- iv. propose measures and strategies to reverse the sectoral and occupational segregation of women's employment, distinguishing between short-term and medium-term measures.

► **II. Methodology and approach**

II.A. Study context and sectoral focus

Industrial parks have been one of the Government's key policy instruments for diversifying exports, increasing productivity, creating decent employment opportunities and fostering economic structural transformation. The parks are dominated by textile and garment and agro-processing industries, which are labour-intensive. The industrial parks are scattered across the northern, southern, eastern, western and central parts of Ethiopia (UNDP 2022). Despite inspiring stories about the expansion of industrial parks, there are concerns related to labour management issues, including working conditions and earnings, as wage employment often coexists with poverty (ILO 2021). As in many low-income countries, women remain disadvantaged because they are under-represented in wage employment and over-represented in low-quality and low-productivity jobs.

This study focuses on two subsectors within the manufacturing industries: agribusiness and textile and garment manufacturing industries. Located at the Yirgalem Integrated Agro-Industrial Park (YIAIP), the agribusiness enterprises are engaged in fruit-processing activities while the textile and garment enterprises are located at Hawassa Industrial Park (HIP), which employs a large proportion of female workers, accounting for 35 per cent of the total number of industrial park workers in the country in 2020.

The selection of sectors and subsectors for the in-depth study was guided by:

- i. the priorities of the Ethiopian Government, including current national development and industrial policy plans; and
- ii. high potential for decent and high-productivity employment for women.

The Government's Ten Years Development Plan and the upcoming second generation of the Homegrown Economic Reform Programme (HGER 2.0) have identified the manufacturing industry as one of the priority areas for increasing investment and advancing structural economic transformation. In particular, the agro-processing and textiles and garment subsectors have been a particular focus of the Government during the planning period (Ministry of Planning and Development 2021). These subsectors also employ a large share of women workers. For example, female employees accounted for 60.5 per cent in the manufacture of food and beverages, 68.6 per cent in textiles and 66.1 per cent in wearing apparel in 2020/21.³ This suggests that these subsectors are largely dominated by women. The two parks are different in terms of their business operations, with HIP focusing on textiles and garments and YIAIP on agro-processing. This distinction allows insights to be gained about gender equality in wage employment in the two parks.

II.B. Description of the industrial parks

II.B.1. Hawassa Industrial Park

In 2016, the HIP opened for business in Hawassa city, located 275 km south of Addis Ababa. It is a specialized park designed for the textile, garment and apparel industry. The park is considered to be a blueprint for the future and the foundation

³ Large and Medium Scale Manufacturing Industries Survey of the Ethiopian Statistical Service.

for supporting Ethiopia's drive to achieve industrialization through promoting light manufacturing industries.⁴ It represents the country's first large-scale investment designed entirely for export-oriented firms.

Currently, the park hosts both foreign and local firms. As of May 2023, 18 companies were operating in the park, employing 23,334 workers, with female workers accounting for 84 per cent of that total (and male workers 16 per cent).⁵ However, companies are not fully operational due to current market restrictions and a shortage of raw materials. In particular, companies have faced significant market challenges since 2022, following the removal of Ethiopia from the African Growth and Opportunity Act (AGOA) duty-free access to the United States of America market.⁶ As witnessed during the on-site visit that formed part of the research, companies are operating at reduced capacity with a limited number of workers. Some companies are retaining a large number of their workers on paid leave, hoping that they can be brought back to work if the situation improves.

II.B.2. Yirgalem Integrated Agro-Industrial Park

The YIAIP is located about 40 km south of Hawassa city (315 km south of Addis Ababa) in south-central Sidama Region.⁷ The 294.5-hectare site falls under the jurisdiction of the Sidama Industrial Parks Development Corporation and specializes in agro-processing. The park aims to substitute local produce for imports and increase exports of processed agricultural products, such as avocado oil, honey, milk and coffee capsules. There are three Rural Transformation Centres (RTCs) situated within a 100 km radius of the park at Bensa Daye, Aletawondo and Morocho. The RTCs are rural development initiatives which supply raw materials to YIAIP. At the RTCs, agricultural produce is collected, sorted, stored and may undergo primary processing before onward transport. For most farmers, the RTCs are the main point of contact with commercial agricultural value chains. As of May 2023, three companies are active in the park, employing 549 workers with female and male workers accounting for 52 and 48 per cent, respectively. Two companies are engaged in the processing and production of avocado oil and one company produces milk.

II.C. Study design and data

The nature of the problem under investigation requires a mixed approach to identify the key barriers and challenges facing women in wage employment in selected women-dominated sectors and subsectors.

From an operational point of view, the study has been supported by a two-pronged approach consisting of (i) desk reviews, aimed at assessing relevant literature and consolidating the available information from secondary sources for quantitative analysis, and (ii) consultations, including with workers, firms, government offices and others, such as bilateral development partners. Data collection was carried out in various ways: consultations, desk review of available documents, exploring records from human resources (HR) offices, call centres and legal aid centres, and other relevant literature.

II.C.1. Desk reviews

The desk review entailed sector characterization and a thorough analysis of labour force surveys and other labour market statistics. Specifically, the National Labour Force and Migration Survey (ESS 2021), Urban Employment and Unemployment Surveys and Large and Medium-Scale Manufacturing Industries Surveys have been used. Based on the quantitative analysis and review of national and global frameworks, key insights are drawn that help to guide the identification of barriers and opportunities for women in wage employment.

⁴ Addisfortune, "[Hawassa Industrial Park to be Inaugurated this Week](#)", 10 July 2016.

⁵ At full capacity, the park was designed to create employment opportunities for around 60,000 workers. At the time of writing this report, the employment opportunities created by the park amount to only a third of its total capacity.

⁶ Tefash, "[Ethiopia's Hawassa Industrial Park Stares at Massive Job Losses over US Decision](#)", 23 July 2022.

⁷ For further information, see "[About YIRGALEM – IAIP](#)".

II.C.2. Consultations

The desk review was also supported by primary information generated through consultations with various stakeholders. Relevant stakeholders were consulted through key informant interviews and focus group discussions to gather information about the explicit and implicit barriers as well as sectoral and occupational segregation affecting women in wage employment. Consultations were held with employers, workers, trade unions and relevant government institutions to generate qualitative information regarding the challenges facing women in wage employment in the identified manufacturing subsectors (table 1).

In HIP, six firms that are engaged in the garment industry have been included in the study.⁸ Of the six companies, four are foreign (funded by foreign direct investment (FDI)) and two firms are local to the HIP (table 2). In the YIAIP, there are three firms (two foreign and one local) operating in agribusiness, out of which one foreign and one local company were included in the study.⁹ In each firm, company managers and workers were interviewed. See Annex I for the full list of active companies and number of workers in each park.

► **Table 1. Number of respondents, by gender, 2023**

Type of respondents	HIP (garment)			YIAIP (agro-processing)			Overall		
	Female	Male	Total	Female	Male	Total	Female	Male	Total
Middle-level and higher-level managers	0	8	8	1	2	3	1	10	11
Head of HR/deputy	2	4	6	0	2	2	0	8	8
Workers (various departments)	25	11	36	5	7	12	30	18	48
Total	27	23	50	6	11	17	31	36	67

Source: Compiled by the author.

Consultations were held with the following stakeholders:

- **Government institutions:** Relevant institutions consulted include the Ministry of Labour and Skills, Ministry of Women and Social Affairs, Ethiopian Investment Commission (EIC) and the Industrial Parks Development Corporation (IPDC), among others.
- **Private sector and trade unions:** Consultations were held with trade unions (such as the Confederation of Ethiopian Trade Unions (CETU) and trade unions in the target enterprises) and the Ethiopian Chamber of Commerce and Sectoral Associations (ECCSA) to gain insights into the barriers preventing women from entering wage employment and interventions to address the challenges.
- **Other data sources:** Additional data was also collected from the call centre and legal aid centre.
 - The call centre has been established by the ILO in collaboration with the EIC and other partners to improve labour management issues in the Hawassa and Bole Lemi industrial parks. The call centre at the HIP provides workers with a means of submitting their grievances and concerns confidentially.
 - The free legal aid centre was established by the Hawassa University in 2011. It has been providing a free legal advisory service to vulnerable segments of the surrounding community, who suffer from different forms of discrimination based on their financial circumstances, gender, health, social status or age.¹⁰ In 2022, the ILO,

⁸ There is only one textile firm operating in the park, but it declined to be included in the study.

⁹ One foreign firm engaged in milk processing at the YIAIP declined to take part in the study.

¹⁰ Hawassa University, “Free Legal Aid Service”.

through its Better Work Programme, collaborated with the Hawassa University to provide free legal aid to the HIP workers (both men and women). It provides free legal services related to labour management issues, which constitute the majority of cases reported by workers.

► **Table 2. List of firms consulted during the study, 2023**

Enterprises	Ownership type (local or FDI)
Hawassa Industrial Park (HIP)	
Epic Apparel Group	FDI
Silver Spark Apparel	FDI
Tal ETG Group	FDI
Sumbiri Intimate Apparel	FDI
Quadrant Apparel Group	Local
Nasa Garment PLC	Local
Yirgalem Integrated Agro-Industrial Park (YIAIP)	
YBM Avocado Oil	FDI
Sunvado Avocado Oil	Local

Source: Compiled by the author.

► **III. Insights and evidence on gender-based segregation from the HIP and the YIAIP**

III.A. Gender-based sectoral and occupational segregation

III.A.1. Characterizing the labour force structure in the industrial parks

Workers employed in the HIP and the YIAIP are predominantly young migrant workers who moved from rural areas or other small towns in search of jobs. Despite some of them being college graduates with diploma and degree certificates, many workers did not possess the relevant skills and training to allow them to adapt quickly to an industrial production set-up with its machines and infrastructure. Completion of grade 8 of Ethiopia's formal education system is the minimum criterion for recruitment to the job, along with simple screening tests on basic comprehension and arithmetic. Although desirable for certain professional staff and managerial level positions, tertiary level education and generic training are less relevant for operator-level tasks.

HR records indicate that there is a large share of women workers in the target enterprises in both parks. The latest data for May 2023 from the IPDC indicates that the share of female workers in the overall workforce of the textiles and garment companies in the HIP stood at 84.2 per cent. Conversely, there is a relatively equal gender balance in the agribusiness enterprises in the YIAIP, with a 52 per cent share of female workers in the total workforce (table 3).

► **Table 3. Total employment and gender ratios in the HIP and the YIAIP, 2023**

Description	HIP (18 companies)			YIAIP (3 companies)		
	Male	Female	Total	Male	Female	Total
Total employment (number)	3,692	19,642	23,334	264	285	549
Gender ratio (%)	15.8	84.2	100	48	52	100

Source: Compiled using data from the IPDC.

III.A.2. Gender-based occupational distribution of workers in the HIP

Deeper analysis of the overall workforce distribution within the selected garment companies in the HIP indicates the presence of both vertical and horizontal gender-based occupational segregation. Figure 1 clearly shows that female workers are over-represented at the operator/associate levels (94 per cent) of the garment production process, positions that do not require special skills or training prior to employment beyond completing grade 8 education. These positions are considered non-professional. Female workers are also over-represented in the cleaning and canteen sections in the companies considered for this study. In the canteen and cleaning departments, female workers represent 91 per cent and 75 per cent of total workers, respectively.

In general, the more highly skilled, "professional" jobs are mainly performed by men while women are generally engaged in non-professional and low-skill jobs. Within the professional-level jobs designated as "staff", women are less well-represented at leadership level, including in managerial and supervisory roles. Thus, the data provides a clear indication of the presence of gender-based vertical occupational segregation in the garment companies in the HIP.

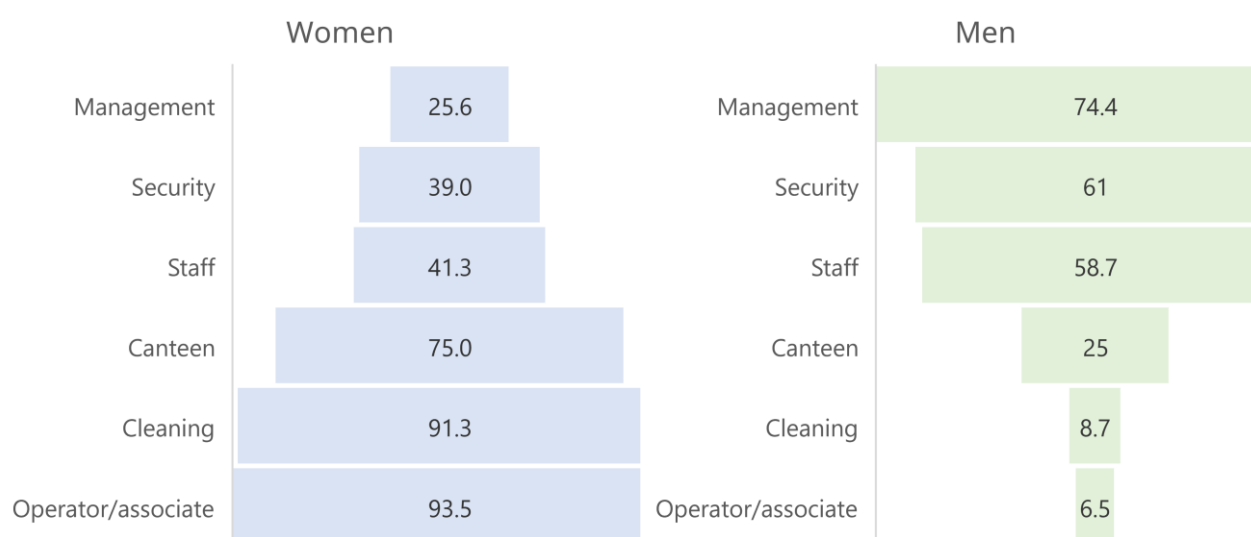
Discussions with workers and management offered fascinating insights into the occupational distribution of men and women. According to company managers, the majority of female workers are engaged in occupations that require "concentration, patience, attentiveness, commitment, long working hours at a certain location and position, and tasks that do not require heavy physical power, such as loading and unloading of goods. On the other hand, more male workers are

engaged in occupations that require heavy physical effort in a certain occupation”.¹¹ This view forms the basis for assigning workers into different units, with women being assigned to the production and quality control units.

In terms of administrative staff engaged in office and clerical tasks, female workers represent only 41 per cent. The ratio of female workers in professional positions falls to just 26 per cent in managerial and leadership positions.

Regardless of the specific activities they are engaged in, all workers at the HIP (except those involved in security, cleaning and canteen services, which are often outsourced) have a permanent contract which is governed by the country’s labour law. Workers do not have specified time limits on their terms and conditions of employment with companies. They are eligible for payroll tax and are also subscribed to the private sector employee pension scheme, as per the country’s labour policy. Therefore, as long as the companies are in operation, workers are considered to be formal employees.

► **Figure 1. Gender distribution of workers by occupation in the garment companies in the HIP, in percentages, 2023**



Source: Compiled from data supplied by companies’ HR departments.

In the target companies, workers and managers were asked to identify and list tasks performed by female and male workers, respectively. Analysis of the interviews indicates the presence of vertical occupational segregation. For instance, operators/associates are deployed to perform low-skilled and low-paid tasks, such as cutting, sewing, recording, tagging, quality inspection, loading, unloading and associated tasks. On the other hand, professional tasks (such as HR management, finance-related and other managerial posts), which require high levels of skill and some degree of experience, are undertaken by staff-level¹² employees, who are recruited through formal competitive staff recruitment procedures (table 4). Regarding senior positions, the share of women in managerial and professional positions accounted for just 2 per cent of the total number of employed women workers in 2020/21. Given that these positions require a higher educational background and greater experience, women’s under-representation is mainly attributable to the low level of education and training of women workers in general.

In addition to the vertical segregation encountered in occupations, there is also horizontal gender-based segregation of occupations. For instance, at the operator/associate level, men are highly over-represented in activities that require

¹¹ Taken from the interviews with company managers.

¹² Across the target companies there is a similar occupational hierarchical structure. Staff-level workers comprise the HR, finance and marketing experts.

muscular strength, such as moving heavy objects or cutting using mechanical tools, while women are assigned tasks that are traditionally perceived to require extra care, patience and attentiveness – attributes that traditional gender norms consider to be more prevalent in women. In one of the garment companies, the manager stated that “women workers are assigned mainly to the production line (for example, sewing, folding and finishing) because they have some attributes, such as soft and thin fingers, attention to detail, etc., which make them suitable for executing such tasks”.

There is also a skewed concentration of women workers in the finance, HR and marketing units while tasks in production supervision, operations support, machine maintenance and logistics are mainly performed by men. A similar pattern applies at the leadership levels, although the share of women declines still further when senior leadership positions are considered.

► **Table 4. Gender-based horizontal segregation of occupations in the HIP, 2023**

Responsibility level	Tasks mainly undertaken by women	Tasks mainly undertaken by men
Management	• Head of Finance • Head of HR • Head of Sales and Marketing • Head of Procurement and Purchasing	• Production manager • Operations manager • Transport and logistics manager • Chief executive officer
Staff	• Finance department • HR department • Sales and marketing department	• Production supervision department • Operations support department • Machine operation and maintenance department • Logistics department
Operator/ associate level	• Sewing, folding • Recording, tagging • Quality inspection • Finishing • Cleaning and sanitary tasks	• Cutting • Carrying, rolling • Loading/unloading • Moving, pulling and pushing

Source: Compiled using fieldwork data gathered through interviews conducted in the HIP.

III.A.3. Gender-based occupational distribution of workers in the YIAIP

The workflow structure of the agribusiness enterprises at the YIAIP differs from that of the textiles and garment factories at the HIP, or elsewhere. On the one hand, the activity flows are different due to the distinct types of tasks and activities performed in the two types of subsector. On the other hand, the two subsectors differ in terms of operational continuity throughout the year. While agro-processing activities can be disrupted due to insufficient supply of locally sourced agricultural raw materials, whose availability is influenced by weather-related seasonal fluctuations, textile and garment factories do not face similar seasonal issues. Discussions with stakeholders indicated that the textiles and garment subsector relies heavily on imported inputs because local inputs are limited in quantity, of poor quality and their supply can be unpredictable.

Table 5 shows that the agro-processing companies at the YIAIP have two employment modalities: permanent and seasonal. All workers who are recruited through formal HR processes and who perform professional tasks, including management and supervision, have a permanent contract with the companies. They are also paid monthly salaries for the entire year, irrespective of production levels. Permanent workers may, however, miss performance-based bonuses and allowances during lean seasons, when the companies close or scale-down production due to input supply constraints.

These periods can range from three to five months per year. Some support staff, such as security guards, are also on permanent contracts because their services are needed regardless of production performance.

Seasonal workers engaged in tasks such as sorting of suitable, ripe fruits for processing, washing, recording, counting, rudimentary inspection, cleaning, loading, unloading and other related operational activities that are dependent on the seasonal availability of fruit for processing are called upon when the need arises. These workers, mainly selected from the local community living in the vicinity of the park,¹³ who are engaged in low-skilled and low-paid jobs, are paid a daily wage covering only the period during which they are working in a particular month. However, they are only covered for basic medical expenses in relation to minor workplace injuries. The number of seasonal workers may fluctuate from time to time, even when the company is operating.

In terms of gender distribution, for the overall workforce in the two agribusiness enterprises, the gender balance is slightly skewed towards women. Female workers are in the majority with up to 57 per cent share in the total workforce regardless of their type of employment contract with the companies. This result therefore indicates that female workers account for a relatively large share of the agro-processing subsector, although not as large a share as in the textiles and garment subsector.

Interestingly, further disaggregation of the data by type of employment contract reveals that male workers dominate in the permanent workers category, accounting for 60 per cent, while female workers constitute the majority in the seasonal workers category, at 65 per cent.

Further scrutiny of the data from the fieldwork at the YIAIP indicates that the share of women in managerial positions (in the permanent workers category) is estimated to stand at only about 30 per cent. However, based on discussions with HR managers at the two agribusiness enterprises, women are estimated to represent about 90 per cent of the workforce who are engaged in sorting and cleaning – tasks which do not require specialized training or skill. There are clear indications of gender-based vertical occupational segregation in the agribusiness enterprises at the YIAIP with women over-represented in low-skilled, low-paid jobs but under-represented in high-skilled, highly paid jobs, including permanent staff and leadership positions.

► **Table 5. Occupational distribution of workers in the YIAIP, by gender, 2023**

Employment type	Occupational distribution		
	Male	Female	Total
Permanent	87 (60%)	58 (40%)	145
Seasonal	104 (35%)	191 (65%)	295
Total	191 (43%)	249 (57%)	440

Source: Compiled using fieldwork data from the YIAIP.

The concentration of workers in a specific occupation or task could be related to the nature of the task, the willingness of workers to voluntarily take up the roles or assignment by employers. It should be noted that voluntary take-up of a task is possible in lower-level occupations (i.e. at operational level) provided that a worker is found to be fit for a given task. Assignment to other occupations, such as staff and managerial level, is based on competitive procedures since these require some level of education and experience. Regardless of the underlying reasons, there is a gender-based horizontal occupational segregation (table 6). For instance, in staff (permanent) and managerial positions, women dominate in the HR, finance and procurement divisions whereas men are over-represented in the production, operations and overall logistics sections, as well as in company

¹³ The companies prioritize jobseekers from the local community to meet seasonal labour requirements with special emphasis given to those applicants whose families have been relocated from the land on which the industrial park has been constructed.

management. In the low-skill and low-paid activities, women are over-represented in occupations such as sorting, cleaning and recording while men are over-represented in tasks such as carrying, loading, unloading, pulling and pushing.

► **Table 6. Gender-based horizontal segregation of occupations in the YIAIP, 2023**

Responsibility	Tasks mainly undertaken by women	Tasks mainly undertaken by men
Management	• Head of Finance • Head of HR • Head of Sales and Marketing • Head of Procurement and Purchasing	• Production manager • Operations manager • Transport and logistics manager • Chief executive officer
Staff	• Finance department • HR department • Sales and marketing department	• Production supervision department • Operations management department • Logistics department
Seasonal/operational level	• Sorting of fruits • Cleaning and sanitary tasks • Counting and recording	• Carrying • Loading/unloading • Moving, pulling and pushing

Source: Compiled using fieldwork data from the YIAIP.

Table 7 indicates that certain operational tasks, such as loading, unloading, cutting, lifting and moving heavy objects, are mainly performed by male workers because it is believed that the physical demands of these jobs can endanger women's health and therefore can only be undertaken by men. The questions were asked of both male and female workers and all respondents agreed that "the main reason for the assignment of such tasks to men is due to the nature of the tasks, as these require physical strength". The potential role of competence and skill has been ruled out in the assignment of tasks such as these.

The absence of women undertaking tasks which are considered dangerous or hazardous to their safety (such as those listed above and certain tasks in the garment companies) is consistent with the Government's rules and regulations under Directive 811/2021 (Ministry of Labour 2021), which prohibits women workers from engaging in "moving, carrying, transporting, lifting, unloading, loading, dragging or pulling" goods that are above a certain weight. For example, in wholly manual and non-continuous work, the weight ceiling is 25 kg.¹⁴ In the companies within the sample, women workers are mainly engaged in light activities which do not involve heavy weights.

Takeaway number 1: The vertical and horizontal gender-based occupational segregation in the target companies is evident in both parks. There is horizontal occupational segregation at all levels while the vertical occupational segregation is multi-tiered with the under-representation of female workers moderate at the staff level but worse in the leadership positions.

¹⁴ Directive No. 118/2021 imposes weight ceilings on women workers. For a wholly manual activity, the weight ceiling is 15 kg and 25 kg for continuous work and non-continuous work, respectively. For a wholly manual activity that involves climbing up and down, the weight ceiling is 10 kg and 15 kg for continuous and non-continuous work, respectively. Finally, if a task is carried out using a single-wheeled barrow, the weight ceiling is 50 kg.

► **Table 7. Possible reasons for assigning certain tasks mainly to men, in percentages, 2023**

Possible reasons	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
It is believed that men are better equipped to handle those jobs	27.1	20.8	18.8	14.6	18.8
Women are less competent to handle those jobs	41.7	18.3	15.0	6.7	18.3
Those jobs are physically demanding, which women can't handle	0.0	0.0	0.0	10.4	89.6
Those jobs require higher skills, and hence are more highly paid jobs	77.1	20.8	2.1	0.0	0.0
Those occupations demand long working hours and time spent in in office	53.4	12.1	5.2	12.1	17.2

Source: Compiled using fieldwork data from the HIP and the YIAIP.

III.B. Gender-based discrimination in recruitment and employment

Discussions with workers and management of the companies as well as with representatives of the IPDC in both parks confirms that staff and management positions are filled through formal recruitment processes which adhere to the country's labour law. In contrast, workers who are designated as "operators" or "associates" are selected through a simple screening process (comprising completion of schooling up to grade 8 and proven ability to write and do simple arithmetic) from the applicant pool provided by the job centre established to compile lists of interested workers from certain catchment areas. The job centre does not use gender criteria in its pooling of potential candidates from the catchment areas. The centre is coordinated jointly by the parks and the regional Bureau of Labour and Social Affairs.

Workers in the textiles and garment companies in the HIP, including the operators/associates, are considered to be permanent since there is no specified limit to their employment contracts and they continue to work as long as the companies remain in business. Workers are also covered by the formal state pension scheme, in accordance with the legal provisions, and are provided with individual pension cards or certificates.

For reasons that were not clearly explained either by workers or the management of companies, the staff and mid- to high-level management positions are dominated by male workers. Even when female workers are present at management level, they are predominantly concentrated in the HR and finance departments and in lower-level supervisory positions while the executive positions of production and overall management (such as the chief executive officer and their deputy) are dominated by men. This signals the possible presence of implicit gender segregation at play against women in recruitment, promotion and overall career progression. Under-representation of women in key leadership positions is also apparent in other sectors. In the banking industry, for instance, women hold only 11 per cent of senior management positions and 15 per cent of board seats (Weis et al. 2022).

What became apparent regarding recruitment and promotions is that a relatively small number of female candidates apply for positions (or for promotion to leadership posts) that require higher levels of educational certificates, relevant specialist training and a significant period of professional experience. Implicit in the above finding is the fact that women are inherently disadvantaged or marginalized in their attempts to acquire the necessary education, training and professional experience due to overlapping economic and socio-cultural factors and practices that prevent women from realizing their full potential. A key informant from the ECCSA also reported that "women have triple roles – productive, reproductive and social. As a result they have time constraints to upgrade their education and to participate in higher positions". Women's roles in domestic and caretaking tasks are tied to gender stereotypes attributed to the social norms

and traditions which are embedded in Ethiopian society. Hence, barriers manifest themselves at different levels, such as individual (multiple responsibilities, limited education and skills and lack of resources), community (such as cultural and gender stereotypes), family (for example, limited support from immediate family) and other socio-political factors (EMAH Social Development Consulting 2022).

During the fieldwork stage in the HIP, it was observed that some companies provide special transport shuttles for pregnant workers. Additionally, all respondents in both the HIP and the YIAIP reported that pregnant women receive preferential treatment in the form of flexible working hours to attend prenatal care appointments and regular pregnancy check-ups, nutritionally rich food and medical attention for pregnancy-related complications. However, such observations, anecdotal evidence and claims do not by any means fully reflect or represent the reality in the integrated industrial parks.

While there is generally some credibility to the widely held belief that employers might tend to favour men over women during the recruitment process in the hope of benefitting from uninterrupted service from employees, the reality in the garment and agribusiness subsectors is quite different. These subsectors have traditionally been more feminized and there is even a preference for employing more women workers than men due to the perceived relationship between the nature of the sectors and traditional gender norms, particularly in the garment and textiles subsector (see III.A.2 above).

Table 8 shows that almost 90 per cent – 43 out of 48 respondents (HIP (33) and YIAIP (10)) – either disagree or strongly disagree with the statement that companies might hesitate to hire female workers due to women's potential desire to start families and temporarily leave the workforce. However, although limited in number, records from the call centre in the HIP do indicate reported cases of pregnant female applicants being excluded during recruitment, which is an indication of gender-based discrimination.

Some 79.2 per cent of workers (both parks combined) agree or strongly agree that more women than men are engaged in low-paid occupations that do not require higher level skills.

► **Table 8. Perceptions of women's recruitment and engagement in low-paid jobs, in percentages, 2023**

		Strongly disagree	Disagree	Neutral	Agree	Strongly agree
The company hesitates to hire female workers because of their potential desire to start a family and leave the workforce for a period of time	HIP	62.2	21.6	10.8	2.7	2.7
	YIAIP	83.3	16.7	0.0	0.0	0.0
	Total	67.3	20.4	8.2	2.0	2.0
Many more women are engaged in low-paid occupations that do not require higher-level skills compared to men	HIP	8.3	8.3	5.6	16.7	61.1
	YIAIP	8.3	0.0	8.3	16.7	66.7
	Total	8.3	6.3	6.3	16.7	62.5

Source: Compiled using fieldwork data.

► **IV. Elements of explicit gender discrimination in recruitment and employment**

Explicit gender discrimination can be manifested in the form of observable exclusion of female workers, preferentially favouring their male counterparts in terms of task assignments, pay scale, treatment (such as abusing women's human dignity) and other opportunities at work. Workers of both genders were asked to assess the severity of selected elements of gender inequality in the companies for which they work.

Table 9 indicates that only a limited number of respondents consider that discriminatory practices exist in the companies as almost 92 per cent of workers reported that unequal pay for the same work is not a problem. A large proportion of respondents also reported that gender discrimination is not a significant problem in terms of the presence of physical threats of violence, gender-based differentiated valuation of competence, exclusion from important meetings and opportunities for women to have their opinions heard compared to male colleagues. A limited number of respondents did report the existence of discriminatory practices, which are manifested in the form of inadequate support from supervisors, being treated as less competent and assigned less important tasks compared to a co-worker of the opposite gender.

An interesting result is that respondents (workers) of both genders consider sexual harassment not to be a problem at all. This could reflect improved understanding and awareness creation among workers and company managers by different stakeholders in addressing the problem. Workers and supervisors mentioned and acknowledged the ILO's Better Work Programme intervention for improving their understanding and awareness of sexual harassment and other labour market issues. There is, however, a prevalence of verbal abuse against female workers, with 53 per cent of workers reporting that this is a problem. Discussions with HR and production department heads also provided evidence of cases of verbal and physical violence, as well as sexual harassment, against female workers, especially by expatriate members of staff and management in the past. Although gender-based abuses and violence against female workers were reported by the management-level respondents from the garment enterprises in the HIP, no one agreed that such abuses currently exist.

Company representatives reported that adequate corrective measures have been taken to rectify these problems, including the deportation of expatriate workers for committing acts of sexual harassment. These measures have been taken based on credible evidence gained through internal investigations supported by the regional Women's Affairs Bureau and Ethiopian Women Lawyers Association. In one of the garment companies, it was reported that 18 expatriate workers were expelled for sexual harassment. Garment companies put in place stringent codes of conduct along with training on standard operating procedures to better sensitize workers. It was noted that companies also adopted non-discrimination policies along with complaint-reporting mechanisms and anti-sexual harassment committees comprising mainly women to address gender-based discriminatory practices. Similarly, agro-processing companies have also become increasingly aware of gender discrimination issues. One of the agro-processing companies reported that a "gender foreman" has been assigned to raise awareness about gender equality, sexual harassment and complaint-reporting mechanisms for women workers.

Company representatives, mainly the HR directors in the target companies in both the HIP and the YIAIP, reported additional mitigation mechanisms to counter discrimination during professional staff recruitment. These include establishing diversified recruitment committees on which women are adequately represented, developing the interview questions and assessment grids before receiving applications, anonymizing and coding assessment papers until results are finalized, and using a uniform assessment process for all candidates to avoid conscious as well as unconscious biases against or in favour of applicants.

Unfortunately, various forms of abuse against female workers could be under-reported and their existence denied, even by female workers themselves, including by those who were victims, due to fear of possible retaliation for speaking publicly. Clearly, such forms of abuse need to be studied carefully, both covertly and overtly, to preserve the privacy and safety of the respondents.

Takeaway 2: Since occupations in the textiles and garment, as well as the agribusiness, subsectors are dominated by women, serious gender-based discriminatory acts are not anticipated during recruitment and employment. However, this does not rule out the existence of implicit and explicit discrimination against women workers, such as the evidenced cases of abuse and sexual harassment against women. Notable efforts and progress have been made to address the issue of gender discrimination in the target companies in both parks.

► **Table 9. Elements of gender inequality at the workplace, in percentages, 2023**

Types of gender discrimination	Not a problem	Minor problem	Moderate problem	Major problem	Very severe problem
Unequal pay for the same work	91.7	0.0	2.1	6.3	0.0
Physical threats of violence	87.5	2.1	6.3	4.2	0.0
Getting less support from a supervisor than a co-worker of the other gender	79.2	10.4	6.3	4.2	0.0
Women being treated as less competent than a co-worker because of gender	85.4	12.5	0.0	2.1	0.0
Women being assigned fewer or less important tasks compared to men	77.1	6.3	10.4	4.2	2.1
Sexual harassment	100.0	0.0	0.0	0.0	0.0
Verbal abuse	37.5	4.2	20.8	10.4	27.1
Women being excluded from meetings and conversations that are important for workers	95.8	2.1	2.1	0.0	0.0
Women being given fewer opportunities to speak compared to male colleagues	93.8	2.1	4.2	0.0	0.0

Source: Compiled using fieldwork data from the HIP and the YIAIP.

IV.A. Gender-based discrimination in promotion and leadership

Transparent and performance-based assessment of a worker's performance for promotions to senior positions is among the key areas for mitigating gender-based discrimination, improving human resource use efficiency, enhancing workplace peace and harmony, and fostering inclusive development. In the context of structural inequality in the opportunities available to develop skills and experience, education and skills development to enable career progression remains fundamental to advancing women's professional careers, including leadership.

Fieldwork data indicates that 36 out of 48 respondents (75 per cent) in the two industrial parks reported that promotions are based mainly on individual employee performance. The same pattern holds in both parks (table 10).

Another potential area of gender-based discrimination against women in job promotion to senior positions is employers' possible concern about frequent or prolonged absence from key official positions when women take leave for prenatal care and maternity leave. However, workers' perceptions and consultations with companies' management, including HR and production managers, did not provide strong evidence of the belief that women might be passed over for promotions and senior positions because of their potential desire to start a family and for taking time off to give birth or receive prenatal care.

In general, discussions with workers and management alike revealed that there is no significant explicit discrimination against women, including those who are pregnant, during promotions. However, one of the key informants claimed that “there are biases in the workplace [against promoting] women to higher positions, and also there is a lack of adequate support from relevant government institutions to mitigate the problem”.¹⁵ The key informant alluded to low levels of education, time constraints and social and cultural discrimination as the key obstacles to women’s career progression and leadership opportunities. Other key informants also indicated that a “lack of communication skills prohibits women’s career promotion to the higher leadership ladder as these positions entail frequent interactions with top managers who are expatriates in foreign companies”.¹⁶ Thus, the insights from key informants are consistent with those of workers in that both bias and the lack of skills and experience continue to constrain women’s prospects of promotion to higher-level positions.

► **Table 10. Performance-based promotion and gender discrimination in promotions, in percentages, 2023**

Description		Strongly disagree	Disagree	Neutral	Agree	Strongly agree
Promotions are based solely on individual employee performance	HIP	0.0	0.0	0.0	22.2	77.8
	YIAIP	0.0	0.0	0.0	22.2	77.8
	Total	0.0	0.0	25.0	16.7	58.3
Women might be passed over for promotions and senior positions because of their potential desire to start a family and for taking time off to give birth or receive prenatal care	HIP	44.4	22.2	30.6	0.0	2.8
	YIAIP	58.3	16.7	25.0	0.0	0.0
	Total	47.9	20.8	29.2	0.0	2.1

Source: Compiled using fieldwork data from the HIP and the YIAIP.

When workers were asked if they have ever thought that their gender might have played a role in missing out on a pay rise, promotion, key assignments or other opportunities to advance their careers, all respondents at the HIP and YIAIP replied in the negative. This implies that workers do not perceive gender to be a key factor in determining their remuneration and promotions to higher positions.

However, there is a pattern of men dominating the leadership positions in both industrial parks (table 11). A total of 27 out of 36 respondents (75 per cent) in the HIP and 11 out of 12 respondents (92 per cent) in the YIAIP reported that there are more men in leadership positions compared to women. Workers’ perceptions about gender representation in leadership positions are consistent with the companies’ HR records, in which women account for only a quarter of the managerial positions. Thus, there is clear evidence that women are less represented in leadership positions than men.

Takeaway 3: Representation in managerial roles is clearly skewed, with women under-represented in leadership positions in both companies. This gender-based vertical occupational segregation appears to be determined by both explicit and implicit constraints that limit women’s potential for promotion, as noted above.

¹⁵ Interview with key informant from the ECCSA.

¹⁶ Interview with key informant from the EIC.

► **Table 11. Perception of gender representation in leadership positions in the workplace, 2023**

Gender representation in leadership positions	HIP	YIAIP	Total
There are more men in leadership positions compared to women	27 (75%)	11 (92%)	38 (79%)
There are more women in leadership positions compared to men	7 (20%)	0	7 (15%)
Both men and women are equally represented in leadership positions	2 (5%)	1 (8%)	3 (6%)

Source: Compiled using fieldwork data.

IV.B. Enhancing women's leadership opportunities and bridging the gender gap

IV.B.1. Factors constraining women's career progression

Consultations with workers in the industrial parks indicate that time constraints and restricted access to financial resources due to household and family responsibilities are the most commonly cited factors affecting women's career progression. Women face time constraints, as they have greater household responsibilities and must allocate more of their time to caring for the family, which limits their participation in education and significantly contributes to women's low levels of educational preparedness and skillset acquisition. They also have limited access to other resources, including credit. One respondent stated that "women have less opportunity for savings and lower access to credit services than men, putting them at a disadvantaged position in building their career since their potential for development is determined by their educational preparation and skillsets, which in turn depends on their capacity to afford them".

There are also traditional roles within households and perceptions that perpetually keep women in lower-level positions. Gender disparities start with the way that children are raised in the country, where boys and girls are treated differently. Unlike boys, for instance, girls have traditionally been responsible for multiple household activities (such as cooking, cleaning, fetching water, etc.) which limit their chances of going to school and adversely affect their educational performance (Yisak et al. 2022). These overlapping economic, social and cultural barriers hinder girls' life chances, constraining women's ability to excel in their education and further their careers. Taken together, these factors discourage girls from making the necessary educational and skill-development preparations, which implicitly caps their aspirations and targets. Thus, traditional negative societal attitudes about women's education and gender equality are some of the invisible barriers affecting women's career progression and leadership potential by limiting both their educational opportunities and their career aspirations.

Takeaway number 4: There are economic, social, cultural and attitudinal factors that constrain women's career progression and limit their potential to achieve leadership positions. Interventions to promote attitudinal change, which should start from early childhood in schools, need to be implemented along with policies to rectify the current situation and implementation-related challenges to meaningfully bridge the gender gap through tailored and targeted capacity building.

IV.C. Workers' support, social protection and collective bargaining

IV.C.1. Company-level and national platforms to protect workers' rights

One of the key challenges raised by the workers, and recognized by members of the companies' management, is the extremely low wage rate, especially in the garment enterprises in the HIP. Workers, especially those in the operator/associate category, are being paid basic salaries in the range of around 750–1,000 Ethiopian birr.

Discussions with the industrial park management team revealed that there was an agreement between the Government and investors regarding a minimum basic salary of US\$29 (equivalent to 1,592 birr at the exchange rate on 11 August

2023) for entry-level operators/associates during the parks' initial operating period. The main reason for setting a minimum basic salary at the parks was to encourage FDI in these subsectors with the promise of low-cost labour in the country, but this is below the living wage for workers, given the escalating cost of living.¹⁷ Currently, some companies pay more than the minimum basic salary, while others do not even pay that. Workers reported that the lack of compliance by companies emanates from a weak monitoring capacity from the state as well as a lack of action by the Government to ensure that companies respect their agreements. A key informant from the EIC has also confirmed that "there was such an agreement, but it was not binding, with no written document or directive to guide the implementation of the agreement". It was also noted that the agreement lacks a formal legal framework or directive for effective implementation and monitoring. For instance, it has remained unclear which exchange rate should be used – the exchange rate at time of the agreement or the official exchange rate at the time of wage payment.

However, the problem of low wages has not been as severe in the agribusiness companies in the YIAIP, where seasonal workers are paid daily wages of about 80–100 birr per day (the equivalent of about 2,080 birr or higher per month if they work for around 26 days). On the other hand, staff-level workers engaged in the professional category jobs at both the HIP and the YIAIP are paid competitive salaries that are comparable with salaries in other sectors or areas.

Although the burden of the extremely low wages affects both female and male workers, the impact is disproportionately felt by female workers as they cannot keep up with the rising cost of living. There is a hidden discounting factor for women's net pay compared to that of men. While both male and female workers might require roughly the same amount of money for subsistence (for example, to cover food, shelter, transport, etc.), women have additional needs, such as sanitary products, care for personal hygiene and regular hairdressing, and the burden of childcare, which often falls exclusively on mothers due to cultural factors. Workers at the lower end of the occupational ladder seem to face a dilemma between remaining in a low-paid job or having no job at all. Many women workers prefer to stay with the companies not because it is worth it, but because it is socially demeaning and embarrassing to go back to their parents. Some workers get additional support from their parents, either in cash or in kind (such as food items) to bridge the gap between the low basic wage and the cost of living. A young female respondent who works in one of the foreign-owned garment companies in the HIP expressed her feelings as follows:

I attended 5 months' long training in Indonesia along with 181 other female and 18 male workers, but I worked for six years for the same basic salary of 1,000 birr. I am also entitled to 300 birr for housing allowance and 400 birr for transport allowance. However, after working for six years, I get paid the same amount as a fresh recruit. I am married and have a child whom I leave at my aunt's home when I go to work. I choose to continue working here due to a lack of alternatives and because I am ashamed to go back to my parents' place.

Discussions with workers, trade union representatives and management staff all acknowledge that wages paid to workers are barely adequate to cover their living costs. Low wages also affect workers' pension contributions,¹⁸ which depend on regular wages. Since wages are low, workers will have low pension contributions and hence low income in retirement. It is commendable that some companies provide different types of support to workers, such as food at the workplace, transport services, bonus payments linked to performance and attendance allowance.¹⁹ However, these services are not provided uniformly across all companies in the parks. For instance, some garment companies provide free transport services while others do not offer such services. A key observation on transport services is the absence of coordination, as individual companies provide transport services exclusively to their own workers so various buses owned by different companies have the same route but serve only their own workers. This could have been better coordinated and optimized so that companies could agree on geographic locations for transporting park workers (on presentation of their identification cards) regardless of which company employs them. The Public Service Transport Service²⁰ of Addis Ababa

¹⁷ According to the Ethiopian Statistical Service (ESS) report, the general inflation rate reached 33.0 per cent in May 2023, with food and non-food inflation rates each recorded, respectively, at 32.5 and 33.7 per cent (ESS 2023).

¹⁸ Workers are required to contribute 7 per cent of their salary while employers are expected to contribute 11 per cent of each worker's salary.

¹⁹ Some companies have introduced attendance allowance payments to those workers who provide uninterrupted services during weekdays. However, if workers are absent without authorized permission, they incur a cash penalty.

²⁰ See "PSTS Public Service Transport Service" for further details.

offers a good example to emulate²¹ although it would require park-wide co-ordination to provide transport services to all park workers.

It should be noted that discretionary packages, including bonuses, are temporary and do not contribute to workers' regular income. Increasing regular wages has the dual benefit of improving both workers' incomes and their pension contributions. But this has an attendant cost for employers. This situation calls for the introduction of a wage floor. The need to set a minimum or living wage in order to address the low-wage challenge has been clearly articulated by different stakeholders, including workers, CETU, park management, ECCSA and government institutions. The Ethiopian Human Rights Commission has also indicated that the average monthly wages paid in major industrial parks are inadequate to guarantee the right to an acceptable standard of living.²² As enshrined in the Federal Democratic Republic of Ethiopia's Constitution and other international human rights conventions, the right to just and favourable conditions of work should provide an individual with remuneration which, at a minimum, guarantees a decent life. Article 89(8) of the Constitution explicitly recognizes the right to work and, when at work, states that the "government shall endeavour to protect and promote the health, welfare and living standards of the working population of the country". Adopting a minimum wage system is one of the ways to safeguard the right to decent work.

Apart from being a human rights issue, there is also a business case for paying a living wage, as decent remuneration can promote and motivate a productive workforce, by improving morale and commitment. Hungry workers have poor health outcomes, which negatively affect performance, leading to reduced productivity and competitiveness of companies. Studies indicate that paying a living wage attracts and retains skilled workers, contributing to the growth of institutional memory and know-how and keeping recruitment and training costs low (Barford et al. 2022; Meyer et al. 2021). It also enhances market access as some countries are adopting new standards which require large companies to undertake due diligence in their global supply chains in order to protect human rights (such as the right to minimum wages) and ensure environmental protection (Grabosch 2021).²³ It is therefore in the best interest of companies to pay a living wage to their workers.

Although adoption of the minimum wage is a step in the right direction, it should be supported by other measures to address problems that workers face. However, the short-term cost pressure of paying adequate wages has been a concern for companies, especially during periods of performance slowdown. In this situation, a cost-sharing mechanism may be introduced, where the Government could repurpose incentives to provide wage subsidies through, for example, tax rebates for companies until normal production levels are restored. This temporary wage subsidy measure²⁴ is expected to benefit not only low-paid workers by increasing their disposable income but also companies by reducing some of their costs and allowing them to retain workers. However, since wage subsidies are temporary interventions, they do not address the problem of low wages going forward.

The HIP management team has taken some promising steps towards easing the impact of low wages and the rising cost of living on workers. One of the key initiatives is a new Consumer Cooperative Union retail shopping centre, which has recently been opened within the park to offer basic commodities, such as food and sanitary products, to workers at fair prices. It also allows workers to buy shares and earn dividends. Similarly, efforts are being made to address the housing challenges facing workers. Discussions with one of the key informants at the HIP indicated that the park has secured land and has already started foundational activities for the construction of up to 6,000 housing units, as well as a daycare facility to support the neediest, prioritizing women with children. It was hoped that support would be forthcoming from the

²¹ The Addis Ababa Public Transport Enterprise provides transport services to government employees. Different buses go to various locations and employees can take any bus depending on their destination. Employees are required to present their identification card, provided by their employers, to use the transport service.

²² Ethiopian Human Rights Commission, "[Call to Prioritize the Establishment of a Minimum Wage System](#)".

²³ For instance, the German Parliament adopted the Act on Corporate Due Diligence Obligations for the Prevention of Human Rights Violations in Supply Chains (Supply Chain Due Diligence Act) in 2021.

²⁴ Wage subsidies were used during the COVID-19 pandemic to maintain both employment and firms' operational capacity.

owners of the companies in the park as well as development partners to ensure the successful completion of the project. On completion, the park will be able to offer a daycare service and housing to park workers at reasonable prices.

There are certain mechanisms in place at enterprise level, as well as nationally, to provide support to workers, although these have not yet proven to be effective in ensuring the rights and welfare of workers. According to CETU, 16 of the 18 textile and garment companies in the HIP have established company-level primary trade unions. Despite the lack of a unified union at park level, a total of about 20,000 workers (86 per cent of the total number) in the HIP are members of company-wide trade unions. At the national level, Ethiopia's Industrial Federation of Textile, Leather and Garment Workers Union, which is a member of CETU, provides support to workers in the textile, garment and leather subsectors. There is currently only one company at the YIAIP that is unionized and this has about 50 members.

There are also bipartite committees (between employers and trade unions) at the company level, which engage in dialogue, negotiate and collectively bargain for better working conditions and dispute resolution. In addition, there is a national-level tripartite committee in place, composed of 15 members representing the Government (Ministry of Labour and Skills and other public institutions), the employers and the employees (with five members each). The committee discusses policies and related regulations to enhance the position and welfare of workers in order to ensure productivity and keep the peace at workplaces. However, discussions with CETU indicate that this platform has been ineffective and is currently barely functional due to the slowdown in economic performance, in particular the limited market opportunities for both foreign and local companies.

In relation to market challenges, discussions with stakeholders indicate that Ethiopia's suspension from the AGOA, recent global supply disruptions related to the Russia-Ukraine war and foreign currency challenges are adversely affecting the seamless supply of intermediate inputs. Local companies are facing severe market challenges and having to rely on other, more active companies (mainly foreign) with better market links to secure task orders. Some garment companies allow a large fraction of their workers to remain on paid leave, where workers receive basic pay only with no additional benefits, and delay salary payments by up to a month.

Despite the existence of some less-than-effective and indeed barely functioning platforms and structures, such as the primary trade unions and the bipartite arrangement at company level, as well as CETU and the tripartite committee at national level, there has to date been no strong and effective mechanism for ensuring the rights and welfare of the parks' workers, including in collective bargaining for improved working conditions and better social protection systems.

Takeaway number 5: There is increased awareness among employers, trade unions and government institutions of the importance of paying a living wage from human rights, moral and business perspectives. Given the adverse consequences of low wages, it is important to speed up the introduction of the living wage. Failure to do so may deter investments, as some major buyers are forced to comply with stringent due diligence requirements.

Takeaway number 6: Transport services provided by some companies are commendable but remain fragmented and uncoordinated. It would be beneficial to coordinate these services through proper allocation of co-ordinated locations for picking up and transporting park workers. Workers should be allowed to board any bus on presentation of the identification card provided by their employers, akin to Addis Ababa's Public Service Transport Service. The park management could take the lead in co-ordinating transport services park-wide.

IV.C.2. Support service centres for workers in the industrial parks

Call centre

The call centre, established through the collaborative efforts of the ILO, IPDC and other partners in August 2022, has served as one of the mechanisms allowing workers to report their grievances in a secure and safe manner.

Between August 2022 and July 2023, the centre received a total of 487 complaint cases, covering a range of issues such as discrimination, contract management and HR management, occupational safety and health, working time and leave, insubordination, strikes and inefficiency. About 90 per cent of the cases reported to the centre in less than a year of

opening are related to contract management and HR management, dealing with issues such as contract termination and delays in processing resignation requests, and payment of benefits after resignation. Work time (and leave) and insubordination accounted for 2.7 and 2.3 per cent of the total reported cases, respectively. Cases included under the work time (and leave) category involve inflexibility, with workers who are also studying denied the right to use their annual leave during exam periods. It was also reported that workers had been assigned to night shifts which would adversely affect their ability to pursue their education.

Under the discrimination category, reported cases include undue pressure being exerted at the workplace when women workers decline sexual requests and the lengthy process involved in applying for maternity leave. Reports from the call centre also indicate that almost 74 per cent of cases have been resolved through consultations with the park management, the legal aid centre, negotiations with company managers and other government institutions, such as the Bureau of Labour and Social Affairs of the Sidama Regional State and federal institutions. By and large, the call centre has improved employee–employer relations and helped the physical, mental and emotional well-being of workers (ILO 2023a, 8).

However, the call centre faces challenges in providing its services. First, the centre has no transportation service (such as a motorcycle) to verify reports received from workers or companies. Second, calls to the centre are not free. When workers make a call to the centre, the telecom company imposes the same charges as for any other call, which results in a cost to workers. Workers therefore prefer to report their cases to the centre in person. Attempts to establish toll-free calls have so far been unsuccessful due to a lack of finance. Finally, the centre also lacks basic office supplies (such as computers, printers, photocopiers, etc.). These challenges combine to prevent the centre from providing effective services.

Legal aid centre

In 2022, the ILO collaborated with the Hawassa University to provide free legal aid to workers in the HIP and other vulnerable segments of society through its Better Work Programme. It provides free legal services related to labour management issues, such as contract termination complaints – the type of case most commonly reported by workers. As of December 2022, the centre had supported 76 (44 male and 32 female) labour-related cases, and this number increased further to 95 (male 69 and female 26) between 1 January and 22 June 2023. Discussions with the expert at the centre indicate that the causes of contract termination take different forms, including inefficiency or poor performance, which is often used as a pretext to mask other reasons, such as being a member or leader or advocate of a trade union or refusing sexual requests. In such cases, workers are often reassigned to other activity lines for which they do not have the skills or experience to perform their new roles efficiently. When women workers decline sexual requests, they often face undue pressure at the workplace, i.e. they are subject to indirect or hidden sexual harassment.

Other cases relate to payment delays after contract termination and work time inflexibility (for example, women seeking flexible working hours to care for sick children). Overall, the centre has played an important role in supporting workers as private legal services are very expensive, with some studies estimating the cost to be US\$250–380 per case (ILO 2023a, 8).

However, the centre faces challenges in providing its services, such as the lack of a dedicated budget to cover the cost of paralegal services providers, including transport expenses. Discussions with the legal expert at the centre indicated that there is a lack of awareness and understanding of the merits of the centre among the university officials and administration. The centre is often seen as a project supported by development partners, but this perception and lack of commitment poses a risk for its sustainability. Interestingly, while its output has been reported in the university's annual performance report, there has been little effort to allocate it dedicated finance. It has therefore become increasingly difficult to provide the service in the absence of financial support, even on a cost-recovery basis.

Takeaway number 7: The call centre and the legal aid centre have played important roles in supporting workers through enhanced bargaining, securing better working conditions and strengthening compliance. The centres have also helped to address gender-based discrimination through awareness-raising, counselling and free legal services. However, both centres are constrained by factors such as lack of finance, transport service, office supplies and commitment from officials and administrations (for example, legal aid).

Women's empowerment, maternity protection and care services

The lack of meaningful efforts to empower women and to create a conducive environment for them to realize their full potential has been evident from the insights obtained during consultations with the companies in the two parks and other stakeholders outside the parks. Some companies in the parks claim to have a policy of affirmative action in place to support female candidates during recruitment and promotion. However, although it can play a role in getting a handful of women into certain positions and can serve as a temporary rebalancing intervention, affirmative action does not fit well with the fundamental idea and goal of women's empowerment.

Beyond affirmative action, few interventions are worth mentioning from the list of what the companies offer to female workers in terms of meaningfully enhancing their capacities and realizing their potential. For instance, companies in the parks do not provide women with support facilities, such as targeted training and skills development, sustained leadership and soft-skills development training, child daycare services, etc. Such support and facilities could have helped female workers to overcome some of the inherent challenges that result from being a woman in a patriarchal society, which include the responsibility for giving birth and raising children. The skills gaps that need to be bridged through empowerment also mainly emanate from social, economic and cultural constraints on women's education and employment. Thus, empowering women and providing such capacity-enhancing support can help them to catch up with their male counterparts.

From a factory worker to a factory owner

With support from the Mastercard Foundation's BRIDGES Programme, the Industry Park Employees Saving and Loan Integrated Scheme has benefited young female entrepreneurs. The programme aimed to increase worker retention and productivity. This scheme, known as *Tatari*,²⁵ enabled workers at the HIP, mainly women, to establish their own garment factory called *Jewata* Garments. This move supported a number of women workers who might otherwise have lost their jobs following the closure of some companies in the HIP due to Ethiopia's removal from the AGOA beneficiary list.²⁶ Both the ILO and the Sidama Regional Government are supporting the group of women, who have organized to own their own factory, with training and technical and administrative services.

As a result of advocacy and support from the ILO and other partners, the IPDC and EIC started preliminary work to set up a park-level centralized daycare facility. The ILO and other partners are also working with selected companies to provide training and mentorship/coaching services to enhance women's leadership skills through, for instance, the ILO's flagship Better Work Programme. Supported by development partners, some companies recently started to adopt peer learning and mentoring programmes for women through what is locally called *acha-le-acha*, or peer-to-peer, learning.

On a positive note, the respondents anonymously confirmed the presence of fairly good practices among the companies for granting women leave for prenatal care and paid maternity leave. In accordance with the 2019 Labour Proclamation (FDRE 2019), companies grant four months of paid maternity leave and allow pregnant workers to receive prenatal care and treatment for postnatal complications. In contrast, men working in the companies across the industrial parks are entitled to a comparatively short period of paternity leave of five days when their wife gives birth. The setting up of support mechanisms, such as the call centre and legal aid office, are playing a key role in enhancing companies' compliance with good practice.

Takeaway number 8: While there appear to be good compliance mechanisms in place in terms of respecting the country's labour law on maternity protection and services for pregnant women, it is equally important to ensure better access to childcare services, including daycare facilities closer to the workplace and time for breastfeeding.

²⁵ *Tatari* is the Amharic word for industrious or hardworking. *Jewata* has the same meaning in the Sidama language.

²⁶ Information gathered at an interview with the chief executive officer of Intrinsic Consultancy PLC, service provider to the *Tatari* Programme under the Mastercard BRIDGES Programme, implemented by First Consult and DAI.

► **V. Conclusion and recommendations**

V.A. Conclusion

The main objective of the study was to identify specific needs and barriers affecting women's employment in these subsectors in both parks to inform sectoral and industrial policy options that could address gender-based discrimination, which is manifested in various forms. This study focused on the garment and agro-processing subsectors in the Hawassa Industrial Park (HIP) and Yirgalem Integrated Agro-Industrial Park (YIAIP).

The study used both primary and secondary data to assess and characterize gender-related inequalities and discrimination in wage employment in the target manufacturing subsectors. Among the secondary data sources were labour force surveys, large and medium-scale manufacturing industries surveys, urban employment and unemployment surveys and other reports. Primary data was collected from the two industrial parks through interviews with workers, company managers, trade unions and park management. In addition, consultations were conducted with government and non-government institutions to gain insights into gender-related inequalities and their underlying causes.

The findings from secondary sources provide gender dimensions of labour outcomes across sectors at national level while the primary data results indicate subsector-specific gender inequalities in the two industrial parks. The overall finding from the analysis of secondary data points to the existence of gender inequality in employment and income across sectors and occupations, indicating significant horizontal and vertical gender segregation. These findings are broadly consistent with the micro-level evidence from the garment companies in the HIP and agro-processing companies in the YIAIP.

Gender-based horizontal and vertical segregation appears to be linked to both explicit and implicit constraints that limit women's participation in the labour market. There are invisible barriers holding back women, including economic, social, cultural and attitudinal factors that constrain women not only in terms of labour market participation but also in their efforts to advance their careers. The following insights provide a more in-depth identification of these barriers.

The female population as a whole has a lower literacy rate and level of educational attainment, which constrains women's participation in the labour market and contributes to the gender gap in employment and earnings. The labour force participation rate for women is not only lower than that of men but also showed a declining trend in both rural and urban areas, exacerbating the gender gap in labour market participation.

Women are not only under-represented in paid employment, they also work shorter hours in paid employment compared to men due to time constraints related to unpaid domestic and family care responsibilities. A large share of women are employed in the informal economy, which offers far from decent work as these jobs are precarious, unstable and not compatible with social protection and other benefits.

There are gender asymmetries in the distribution of unpaid work, in which women are over-represented, mainly in agriculture which offers limited opportunities for decent work. These asymmetries further exacerbate the gender pay gap.

There is significant disparity in the gender pay gap across subsectors, with relatively larger unadjusted gender pay gaps in manufacturing, household activities and arts, entertainment and recreation.

Women are largely under-represented in higher-level occupations and over-represented in low-skill, low-productivity and low-paid occupations with limited opportunities for promotion and career progression. This skewed pattern of occupational distribution also contributes to the gender pay gap.

The above findings are largely consistent with the micro-level evidence from the garment companies in the HIP and agribusiness companies in the YIAIP. The key findings from the HIP and YIAIP are presented below.

- Gender-based discriminatory practices appear not to be pervasive in the garment and agribusiness companies, particularly during recruitment and employment. However, there have been reported cases of other forms of gender discrimination, such as verbal abuse and indirect or hidden sexual harassment. When women workers decline sexual advances, they often face undue pressure in the workplace, such as reassignment to activity lines

for which they have neither the skills nor the experience to perform the new role. This leads to poor performance in the new role, which is used as a pretext to terminate their contract.

- There is glaring vertical and horizontal gender-based occupational segregation in the garment and agribusiness companies. The vertical segregation takes a pyramid form in which women workers are over-represented in the lower tier of occupations but under-represented at higher levels of the occupational ladder. Women are also significantly under-represented in leadership positions.
- Vertical occupational segregation also leads to pay gaps, as there is a large pay differential between the lower-level occupations (predominantly undertaken by women workers) and higher-level positions (dominated by men). The issue is not so much the gender pay gap, which arises only from pure discrimination, but the structure of women's and men's employment and the generally low basic wage, which is inadequate for a decent standard of living regardless of gender. There is generally a limited pool of women workers at professional and managerial levels in the country due to women's low levels of educational achievement and lack of experience. Workers at the lower end of the occupational ladder face a dilemma of either staying in a low-paid job or having no job at all.
- There are notable efforts at enterprise and park management level to support low-wage workers by providing food at the workplace, transport services, medical coverage for workplace injuries, housing allowance, bonus payments linked to performance and attendance bonuses, among other benefits. Initiatives in the HIP include construction of houses, offering consumer goods at reasonable prices through the Consumer Cooperative Union and the construction of daycare facilities within the parks.
- The call centre and the legal aid centre have played important roles in supporting workers through enhanced bargaining, achieving better working conditions and strengthening compliance. However, challenges persist, constraining their service delivery, including inadequate finance, lack of transport services and shortage of office supplies, among others. In particular, the call centre does not have a toll-free service, which compels workers to report cases in person as making a call is expensive.
- There are promising compliance mechanisms in place among companies relating to maternity protection and services for pregnant women, although critical facilities for children's daycare and breastfeeding are absent.

V.B. Recommendations

After identifying the key barriers to women's employment, intervention areas are suggested which are organized in seven pillars. These comprise policy and regulatory measures, competence and skills building, awareness raising, wages and incentives, support centres and tangible commitment, facilities and coordination, and social dialogue. For each pillar, specific intervention measures to ease the constraints are identified (table 12).

Table 12. Recommended interventions and responsible institutions

Barriers	Interventions	Lead institution*	Collaborating institutions*
Policy and regulatory gaps	Revise and update a three-decades-old gender policy and other related laws in light of evolving domestic and global circumstances.	MoWSA	MoLS
	Adopt a legal framework to require institutions (both government and private sector) not only to articulate gender issues in their policies and plans, but also to report their progress using key gender-sensitive indicators.	MoWSA	MoLS, MoPD
	Maintain the stability of a designated gender co-ordinating public institution mandated to avoid the fragmentation of effort and loss of institutional memory arising from frequent institutional restructuring.	MoPD	MoWSA

Limited competence and skills	Incorporate gender equality into the curriculum, starting from the lowest level of education, so that future generations begin to learn about gender equality early on.	MoE	MoWSA, MoLS
	Design and implement tailored skills-enhancement programmes to address the gender backlog in competence deficits for women workers to help them climb the occupational ladder for productive employment and career progression. This includes both technical and soft skills, such as communications, and familiarization with modern industrial production set-ups before they join industrial parks or other manufacturing sector roles.	MoWSA	MoLS, MoI, ILO, ECCSA, CEEF, EEF, CETU
	Scale up ongoing women's empowerment initiatives, such as the ILO's Women Leadership Development Programme (ILO 2022, 2023b).	MoWSA	MoLS, ILO
	Motivate companies to invest in skills upgrading for women workers through functional incentives linked to skills improvement.	MoI	MoF, EIC, IPDC
Inadequate awareness	Promote awareness raising about gender equality and roles of men and women within and outside the household through coordinated and sustained national sensitization and enhancement campaigns.	MoWSA	MoLS, MoE, ECCSA, trade unions, CETU, CSOs
	Raise awareness among park workers and park management of national labour policies, proclamations, institutions, directives, etc., to improve their understanding of their respective rights and responsibilities.	MoLS	MoWSA, IPDC
	Popularize good practices in managing gender discrimination and introduce mechanisms to recognize companies that show positive evidence of compliance in an annual award event.	MoWSA	IPDC, ECCSA, MoI, MoLS
Low wages and incentives	Initiate and expedite the establishment of minimum wages.	MoLS	CETU, CEEF, EEF, ECCSA, CSOs, MoI
	Enforce the implementation of the negotiated wage rate at entry level through designing a regulatory framework that is responsive to the changing cost of living and exchange rate variations.	EIC	MoLS, IPDC, MoI
	Strengthen trade unions to improve their negotiation capacity in relation to wage setting and working conditions.	CETU	MoLS, MoWSA
	Introduce a temporary wage subsidy during production shocks to maintain employment and business operations. This could take the form of a cost-sharing mechanism, in which the Government could repurpose incentives to provide wage subsidies through, for example, tax rebates for companies until production capacity is restored.	EIC	MoF, CETU, CEEF, EEF, IPDC, MoI
Limited capacity of	Boost the capacity of the call centre by establishing a toll-free call hotline service to make the centre more accessible and less	IPDC	EIC, Ethio telecom

support centres and inadequate commitment	expensive. Other support could include office supplies and transport services to improve its service provision.		
	Support the legal aid centre by allocating a dedicated budget to cover the cost of paralegal services and other expenses for effective delivery of its services to those who cannot afford to buy those service on the open market.	IPDC	HU, ILO
	Open a dialogue to create awareness among stakeholders about the roles of the call centre and legal aid centre.	IPDC	HU, ILO, EIC
Inadequate facilities at workplace and weak coordination	Introduce a synchronized transport service through the provision of park-wide bus transport services for all park workers.	IPDC	EIC
	Facilitate the rollout of centralized low-cost services and facilities, such as shopping centres owned by consumer cooperative unions, housing for working mothers, children's daycare facilities and allocated time for breastfeeding.	IPDC	EIC, MoWSA
	Develop a joint plan of action to improve coordination on gender equality between the Ministry of Women and Social Affairs and the Ministry of Labour and Skills.	MoWSA	MoLS
	Put in place gender responsive occupational safety and health programmes in the industrial parks.	MoLS	EIC, IPDC, MoI
Limited social dialogue	Establish a unified trade union at park level to effectively serve the interests of workers and the wider society.	CETU	CEEF, IPDC, EEF, MoLS, firms
	Support the establishment of trade unions where such unions are absent and ensure adequate representation of women workers in trade unions.	CETU	CEEF, IPDC, MoLS, firms
	Activate and organize a regular social dialogue forum at bipartite and tripartite levels to address work-related challenges, both in the park and nationally.	CETU	MoLS, CEEF, EEF, ECCSA

* Notes: CEEF = Confederation of Ethiopian Employers' Federations; CETU = Confederation of Ethiopian Trade Unions; CSOs = civil society organizations; ECCSA = Ethiopian Chamber of Commerce and Sectoral Associations; EEF = Ethiopian Employers' Federation; EIC = Ethiopian Investment Commission; HU = Hawassa University; ILO = International Labour Organization; IPDC = Industrial Park Development Corporation; MoE = Ministry of Education; MoF = Ministry of Finance; MoI = Ministry of Industry; MoLS = Ministry of Labour and Skills; MoPD = Ministry of Planning and Development; MoWSA = Ministry of Women and Social Affairs.

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► Annex

Annex table. List of active companies and number of workers at the HIP and the YIAIP, by gender

Textile and garment companies at Hawassa Industrial Park (May 2023)				
No.	Company name	Male	Female	Total
1	Best International Garment PLC	49	530	579
2	EPIC Apparel PLC	243	1,509	1,752
3	Everest Apparel Ethiopia PLC	99	2,821	2,920
4	Hela Indochine Apparel LTD	253	1,284	1,537
5	Hirdramani Garment PLC	552	833	1,385
6	Indochine Apparel PLC	903	3,844	4,747
7	Isabella Socks Manufacturing PLC	126	405	531
8	ITL Apparel Labelling Solution PLC	18	8	26
9	PTU/Century Garments PLC	82	1,199	1,281
10	Quadrant Apparel PLC	22	286	308
11	Silver Spark Apparel Ethiopia PLC	225	2,850	3,075
12	Sumbiri Intimate Apparel PLC	203	1,037	1,240
13	Tal Garments PLC	129	642	771
14	JP Textile Ethiopia PLC	556	308	864
15	Nasa Garment PLC	20	546	566
16	JP Garment Ethiopia PLC	47	856	903
17	JAS Holding Garment Solution PLC	93	38	131
18	Injo Apparel Manufacturing PLC	72	646	718
Total (HIP)		3,692	19,642	23,334

Continued**Yirgalem Integrated Agro-Industrial Park (May 2023)**

No.	Company name	Male	Female	Total
1	YBM Avocado Oil	49	144	193
2	Sunvado Avocado Oil	142	105	247
3	JOJO MILK	73	36	109
Total (YIAIP)		264	285	549

Source: IPDC.

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