

THE NATIONAL FEDERATION OF FARM, PLANTATION, FISHERY & AGRO-INDUSTRY TRADE
UNIONS OF ETHIOPIA (NFFPFATU)

Promoting Workers' Right in the African Horticulture

Labour Condition in The Ethiopian Horticulture Industry

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Ethiopia's flower industry is the recent and fast growing in Africa. The industry is a source of direct employment for over 50,000 Ethiopians. However, the majority of them live in appallingly poor conditions including high levels of casualisation, low wage, inadequate training & provision of PPE. The prevailing aspects of better working conditions in the sampled farms can be attributed to factors such as the consistent need or demand by unions for better working conditions and farm owner's/ management's disposition.

1. Introduction

Floriculture is one of the fastest growing export industries in Ethiopia. Today, the cut-flower trade is conceived to be an important means of diversifying the export regime, an additional source of export earnings and an employment generation opportunity in Ethiopia. According to the Ethiopian Horticulture Producers and Exporters Association information release, by the year 2008 the number of horticultural products exporters had risen from 5 in 2002 to more than 100 in 2008. Foreign exchange earned also witnessed a substantial leap over from 1.5 million USD in 2002 to 125 million in 2008. Moreover, it is also declared that the sector created an employment opportunity for above 50,000 needy citizens (directly and indirectly) (EHPEA 2009).

Despite becoming one of the more successful sectors of the Ethiopian economy in recent years, little is in fact known about the labour market in the flower sector. Even less is known about employment conditions in the sector. While the employers hold that flower-growing enterprises fully respect international and national labour legislations and even offer conditions of labour and work much above those observed in other parts of the agricultural sector, cases of violation of workers' rights are common. However, concerning the employment conditions of workers very few, if none at all publicized documents in the flower industry exist. In particular, no publicized representative study at the national level could be traced. Consequently, this analysis is based on a data collected August 2009 in 15 operational flower enterprises located in different parts of the country

Agriculture constitutes the lion share for most of the Sub-Saharan countries export structure (regime). Moreover, many of them rely on the export of mono-agricultural commodities (such as coffee, cocoa, cotton). Apparently, the market price of such primary agricultural products is very low and volatile in the global market.

The structure of the Ethiopian export sector, similarly to most developing countries, is dominated by primary commodities whose price and income elasticity is very low. For the last three-decades, the country has been facing an unsustainable trade and current account deficit due to mainly the stagnation or slow growth of the export sector in the face of an increasing import bill. The export sector has an important role to play in narrowing down the current account deficit and financing technology transfer and capital goods import which is believed to help accelerate the transfer of knowledge and facilitate growth.

The flourishing of the industry, in a country where unemployment is a big problem, capital is scarce and labor is abundant, coupled with the relatively huge participation of foreign direct investors in the industry and the dramatic performance registered in foreign exchange earnings, in Ethiopia has therefore become a significant contributor to the national economy as well as a key means of linking the poor to the global product markets. Young unemployed citizens, women in particular, have been able to take advantage of new employment opportunities arising from the introduction and growth of the cut-flower industry in Ethiopia. However, a growing concern relates to the poor labour conditions in cut flower production throughout Africa and Latin America. Some available information suggests, that working conditions are often not as per nationally or internationally accepted standards: many workers are susceptible to health problems because they are daily exposed to pesticides; written contracts hardly exist; trade unions are not always welcome at farms; the wages are not sufficient to meet daily needs of a worker and her family and female workers have often to cope with sexual harassment (VIDEA May 2002: Collinson 2001: William A. Shivoga at <http://www.egerton.ac.ke/academics/ferd/> and <http://www.sumawa.org>). Within this context, one of the strategies that has been proposed in recent years to address such concerns and to promote increased respect for workers' rights and health is certification linked to voluntary codes of conduct.

1.1. Executive Summary

The following summary presents the key findings of the study, focusing on the examination of the ILO's fundamental rights at work and the National Labour Code No. 377/2003 as points of references. Furthermore, the summary will focus on comparison of employment conditions in line with sex. Finally, the summary will end with an overview of specific recommendations to the different stakeholders based on their respective prerogatives;-

- **Market;-** It is revealed that the largest market for horticulture products in general and cut flowers in particular is the European market the Dutch auction being the main market followed by UK super markets and German auction centers. Some products are also being exported to non European markets such as Japan. An increase in the size of actual green house covered acreage of farms has been witnessed in the past two years.

- **Workforce Characteristics;** - The labour force in the visited farms was mainly local, while most of foreign owned farms employ foreign workers as technicians and production specialists. The majority of workers in farms were employed in fixed terms and as daily labourers. The labour force in the farms was aged 18 years and above; an indication that the farms had complied with child labour regulations. The labour force in the farms was generally at the active reproductive and productive stage of their life on average. In all farms, female workers constitute the majority of the workforce. The concentration ranges between -61 % to 78 % and most of the workers in the industry are non-married or single. The proportion of married male workers is higher than their female counter parts.
- **Workers Educational Attainment:-** 18 % of workers had been educated up to secondary school level education, while the majority 57 % of workers had attained primary & secondary school education while 19% of workers attained tertiary level of education.
- **Provision of Facilities:-** Concerning the provision of facilities on the farm, the larger proportion of workers had access to potable water supply on their workplaces during duty hours toilet facilities and a higher proportion of workers had access to pit latrines were provided in most farms. These facilities were seen to be adequately clean. However, only few farms organized transport facility to their workers as a result most workers travel to and from job walking.
- **Working Hour & Overtime;-** In most farms the recommended working hours of 8 hours a day is adhered according to the management, however, worker respondents revealed that overtime, in almost farms is compulsory especially during peak seasons which is a violation of national law.
- **Wage & Benefits:** - The majority of workers earned a monthly salary of between 10 – 15 ETB (approx 50p – 70p) for the formal 8 hour working day and 300 – 450 ETB (approx £15 - £22) for a 192 formal working hours of a month. There was no variation in wages earned by male and female workers. Over the past one year period in all farms there was an improvement in monthly wage. However, given the ever increasing price of subsistence consumer goods there was a significant gap in workers' ability to afford their basic needs and the wage they earn. As a result, most workers found it difficult to meet their daily needs with the meager wage they earn and saving and investment by these workers is almost nonexistent. Two farms offer a provident fund of 11 & 10 % for their permanent workers and one of these farms also cover 75% of educational expense for workers attending their education.

- **Leave;** - Most (12) farms give paid annual leave for most of their workers (permanent & fixed term workers) compared to the remaining farms who give paid annual leave for only permanent workers. While 10 farms offer paid weekly leave for permanent & fixed term workers and non-paid weekly rest for daily labourers, 5 farms offer no week leave for daily labourers at all. Almost all workers enjoy the benefits of paid sick-leave so far as workers can present an officially verifiable certificate. Among the total female respondents, 42% of claimed enjoy paid maternity leave and the length of maternity leave ranges from 2 to 3 months.
- **Employment Security;** - This study showed that the majority of the workers in flower farms are employed as daily labourers or as fixed-term employees and managers claim that it is due to the seasonality of production. However, the strategy of employing temporary labour means employers can hire and fire easily. It also means that employers save on labour costs as they do not have to pay the same benefits as permanent workers are entitled to. The study team interviewed some workers who have spent about three years as daily labourers at the same farm. Without being awarded permanent contracts. This excessive degree of casualization means that workers are not assured of their employment throughout the year. Employment insecurity is much higher with female workers as compared to male workers.
- **Health and Safety;** - Health and safety issues seem to be generally taken seriously in most of the visited farms. 11 farms (73.33 %) had a health and safety officer on site as well as a workers and management joint health and safety committee. 26.66% of farms had neither a health and safety officer on site nor workers and management joint health and safety committee. Sprayers were provided with at least two personal protective equipments, the most common PPE being respirators and gloves. However, flower harvesters and transporters who are predominantly females, only 5% of workers were provided with gloves. From all worker respondents only 2% had been trained in health and safety issues or HIV/AIDS awareness organized by their employers. A larger majority of workers are provided with medical care for occupational illnesses and injuries. With regard to medical check-up - blood enzyme test - only spray workers are sent for the check-up. The frequency of the check – up being from 3 months to 1 year.
- **Harassment;** - There were very low levels of harassment in general and cases of physical abuse in the visited farms. Few workers reported cases of threats of dismissal from the owners, managers and supervisors of the farms, and similarly few cases of physical abuse

threats from fellow workers. However, 69 (24.62 %) of female workers disclosed that they have experienced sexual harassment where by unwanted jokes, gestures, offensive words on clothing, and unwelcome comments and repartee, touching and other bodily contact such as scratching or patting a coworker's back, grabbing an employee around the waist, or interfering with an employee's ability to move either from managers, supervisors or colleagues being the common case.

- ***Freedom of Association & Collective Bargaining;*** - Union membership as a facet of Freedom of association is highly prevalent and about 75% of worker respondents are subscribed members of the basic trade union in their respective workplaces. The majority of workers said that the unions represent workers interests. Similarly, workers expressed their concern that being a union official or active union promoter would result in threat to dismissal or denial of access to promotion.
- ***Codes of Conducts:*** - By the time data was collected, eight of the fifteen farms had adopted codes of practice, with the MPS and EHPEA Code of Practice being the dominant. In one case a farm was found adopting FFP code. Concerning workers knowledge on codes of conducts, the picture is grim that 92 % of worker respondents didn't know which code their farm subscribe to or they have never heard of the existence of the so called codes of conducts or certification schemes at all.
- ***Maternity Protection;***- Only 41% of the workers interviewed were entitled to paid maternity leave, while 23% were entitled to unpaid maternity leave, 15% reported that they are not entitled to maternity leave and another 21% disclosed that they don't know whether they are entitled to maternity leave or not. None of the farms surveyed had a day care centre for the non-school going children, neither were workers provided with school fees assistance for the school-going children.

1.2. OBJECTIVES OF THE STUDY

This research report is an integral part of the Comic Relief funded project through Women Working Worldwide (WWW) hosted by The National Federation of Farm, Plantation, and Fishery & Agro-Industry Trade Unions of Ethiopia (NFFPFATU). The Project seeks to improve the lives of horticulture workers in general and women workers in particular who form the majority of the workforce. The project further aims at supporting the National Federation of Farm, Plantation, and Fishery & Agro-Industry Trade Unions of Ethiopia

(NFFPFATU) so that the federation can defend women workers' rights. Accordingly, this action research report is generally aimed at establishing empirical evidence on prevalent core labour deficits in order to establish a strategically articulated intervention towards promoting horticulture workers rights. To this end, the study established itself with an engagement of documenting the fact file of the sector and thence labours deficits. Concomitantly, the following were specific objectives of the study:-

- I. To document a labour pertinent fact file of the cut flower industry in Ethiopia.
- II. To examine the nature of employment and labour conditions in the cut flower industry
- III. To identify what sort of actions might stakeholders (government, employers, trade unions, CSO and international stakeholders) undertake to ensure the socially and environmentally considerate cut-flower production and ensure the sustainable contribution of the sector to the national economy.

1.3. Questions of Study

On this basis, the following questions guided the fact filing and analysis of the study:-

- i) What does the size, product variety, ownership of the industry looks like?
- ii) What specific features do the demographic characteristic of workers have?
- iii) What are the core labour deficits prevalent in the industry?
- iv) To what extent are the core ILOs declarations of fundamental rights at work and pertinent national legal standards adhered to.
- v) What sort of actions might stakeholders (government, employers and trade unions) undertake for the way forward to ensure socially and environmentally sustainable cut-flower production and that the industry contributes to the national economy.

It is hoped that this report can serve as an empirical source of information and evidence for those who aspire to see the development of the industry and labour and environmental right respected simultaneously.

1.4. Methodology and Data Collection

The study was mostly qualitative in its approach and both primary and secondary data was used. Hence, data collection involved a desk review of pertinent documents (brochures, pamphlets, internet sources, news papers ...etc) that established recordings of the trend of development of the sector since its inception in Ethiopia. Furthermore, primary data was

collected through two separate semi-structured interview questionnaires administered with workers and managers in selected cut-flower farms and substantive issues further explored through focus group discussions.

1.5. Sampling Procedure

At a national level there is no officially communicated data on the number of licensed projects and operational flower farms. However, according to Mulu & Tetsushi until 2008, there were 67 operational flower farms in Ethiopia (Mulu & Tetsushi 2009). This has now increased to over 70 with at least 3 new farms being established (please note that the number of farms is constantly fluctuating as farms close and others open). However, the sample of the study was purposively determined to be 15 (22.39 % of these operational farms). Selection of the sampled farms took in to account ownership, product type and physical location of the farms.

No	Physical location (cluster)	Ownership				Sample			
		F	N	J	T	F	N	J	T
1	Zeway	4	4	0	8	2	2	0	4
2	Koka	3	0	1	4	2	0	0	2
3	Bishoftu	3	1	3	7	0	0	0	0
4	Addis alem Sebeta/ Tefki	4	3	4	11	1	1	0	2
5	Menagesha/ Holeta	8	11	2	21	2	1	0	3
6	Sendafa/ Sululta	2	2	2	6	2	0	0	2
7	Others	4	4	2	1	1	0	1	2
8	Total	27	24	14	65	10	4	1	15

Source:- Oromia Regional State Investment Office as quoted by Mulu & Tetsushi. Please note that 2 farms are not included in this table because they are located outside of the jurisdiction of Oromia in Amhara and SNNP.

Table 1; - Sampled Farms Cluster distribution

Accordingly of the 15 sampled farms 10 (66.67%), 4 (26.67%) & 1 (6.66%) are owned by Foreigners, Nationals and jointly by foreigners and nationals consecutively. Furthermore, in terms of flower variety 12 (80%) produce roses, 2 (13%) summer flowers and the rest 1 (7%) produce cuttings.

Based on a preliminary assessment staged at the outset of the study, it was learned that the sampled 15 farms have a total workforce of 9,910 (permanent and non-permanent workers) in which 71.34 % and 28.65 are females and males. To this end, a total of 15 farm managers,

384 (268 female & 116 male) workers were randomly selected as interview respondents through random sampling through an attendance list from human resource departments of the respective sampled farms. Furthermore, a total of 30 (13 female and 17 male) workers who have participated training at three different centers organized by the federation were admitted to a focus group discussion.

In addition to the above categories of first hand information sources, the following 19 key informants have been contacted; 1 Federation Leader, 6 local labour specific government officials-

- The National Federation of Farm, Plantation, and Fishery & Agro-Industry Trade Unions of Ethiopia (NFFPFATU) – one person
- 6 (Six) Woreda and district Regional Labour and social affairs Offices.
 - Eastern Shewa Zone Oromia Regional State.
 - Zeway town Oromia Regional State.
 - South Western Shewa Zone Oromia Regional State.
 - Southern Shewa Zone Oromia Regional State.
 - Northern Shewa Zone of Oromia Regional State And
 - A handful (12) of local residents in each flower cluster areas.

1.6 Scope and Limitation of Study

It is pretty much certain that a compressive study covering each and every single industrial relations in the cut flower sector calls for an extended deal of time and other resources beyond what is available for this piece of work. To this end, the study was restricted to focusing on core indicators of labour rights as enshrined in international and national instruments. To mention two of the limiting factors, first the sparse distribution of clustered farms made the data collection cumbersome and secondly, collection of data from worker respondents through the organized semi-structured interview questioners was extensively time demanding on average completing a single questioner took from 40 – 50 minutes which was a big challenge for data collectors to access respondents while workers are on duty.

Nonetheless, against all odds, the report can pave the way for informed intervention that social justice proponents are striving and fight for.

1.7. Organization of Study

The report is structured in six parts. The next section will present a brief summary of the global flower industry, changes in the flower-growing industry in Ethiopia since its beginning, estimates the performance of the sector in terms of foreign currency earnings and employment generated by the sector. Section 3 will discuss some of the main characteristics of the sampled farms such as ownership, acreage, marker... etc. Section 4 talks about the demographic characteristics of the workforce in general and the sampled workers in particular. Section 5 addresses questions relating to types of labour contracts, wage levels, social benefits, working time, occupational health and safety and sexual harassment. The final section contains a summary of the main findings and conclusions.

2. A glimpse outlook of Trends of Cut Flower Production, & Consumption

2.1. The Global Flower Industry

Cut flowers are parts of plants, characteristically including the blooms or “inflorescences” and some attached plant materials, but not including roots and soil. Fresh cut flowers are highly perishable because they maintain only limited life-supporting processes by taking water up through their stems. Fresh cut flowers are used for decorative purposes such as vase arrangements and bouquets at formal events; designs for weddings and funerals; gifts on occasions such as Mother’s Day, Valentine’s Day, in times of illness, and at holidays such as Christmas and Easter; corsages and boutonnieres; and informal displays to beautify homes and public places.

The world cut flower trade is characterized by a high degree of concentration by product and sources. Roses are the main traded product in the world. Germany is the main market for imports, while the Netherlands is the world's leading exporter, exporting about 60 %. Exports from the Netherlands to Germany are a principal component of the world cut flower trade. Switzerland, France, and the United Kingdom are the other main markets for Dutch flowers (Protrade, 1996, p. 53 as quoted in ILO 1998).

2.2. The Ethiopian Flower Industry

In the early 1990s commercial expansion of flower-growing was initiated with an emphasis on overseas markets. Due to suitable weather conditions, altitude, favorable market in the rest of the world and domestic enabling environment for investors, the number of new farms is increasing and the existing farms are expanding and consequently the volume of cut flower production is increasing. The production of cut flower is destined entirely for export. The production system is capital and technology intensive, and production mainly takes place under green houses.

By February 2006, of the 70 operational flower farms (50 % of the investors were known to be nationals, 37 % are foreign and the balance 13 % is joint venture) enterprises already existed in Ethiopia, quickly followed by new enterprises. Almost 100 % of the production of fresh flowers originates from the different zones of Oromia Regional state within a 50 km radius around Addis Ababa (Mulu & Tsusti 2008)

2.3. Production and Export Trends

Flower-growing in Ethiopia is truly a success story. Since its inception the sector has been oriented towards external markets; the market for the Ethiopian cut flower export is overwhelmingly Europe (85 %). In particular, Ethiopia's export has relied on the Dutch flower auctions at Alsmeer (VBH), the Netherlands where 60 percent of the world's flowers are traded. In the span of just 5-7 years, from first only 0.59 million USD in 2002/03, sales abroad have "blossomed" to USD 45.58 million in 2006/07 and from simply being one item among a few agricultural exports, floriculture today heads the list of non-traditional exports.

Year	Weight	Value Etb	Ave. \$ to Birr	value (usd)	% change Value	% Change in Vol.
2004	202,877.00	7,088,619.03	7.70	921,198.05	0	0
2005	3,527,667.55	101,476,738.84	8.10	12,527,992.45	1260%	1639%
2006	9,137,082.87	321,547,395.14	8.50	37,829,105.31	202%	159%
2007	18,235,012.20	787,440,383.79	9.03	87,202,700.31	131%	100%
2008	25,470,434.33	1,197,976,217.48	9.57	125,156,837.53	44%	40%

Table 2:- Export Performance 2004-08

Source: - Own compilation from NBE database

The remarkable performance can also be evaluated by comparison with performances of the major traditional export items of the country. The performance of the major agricultural commodities export in their respective percentage share, including cut flower for the four-year period is depicted in Table 3 below and the amount under column 2003 is presented with reference to the preceding year..

Major Commodities	2003	2004	2005	2006	2007	2008	2009
Coffee	35.8	50.7	5.9	18.6			
Oilseeds	80.2	24.2	72.8	-24.5			
Hides and skins	-16.1	54.3	10.4	14.6			
Pulses	13.7	57.6	4.3	82.03			
Chat	52.4	13.9	-10.6	-2.27			
Flower	296.6	234.6	177.9	173.73			
Cumulative growth rate	25	36.7	16.9	6.9			

Table; - 3 Major Commodities and Cut flower Export Growth Rate(2002/03- 2008/09)

Source: Ethiopian Customs Authority

Compared with the major traditional export items, cut flower export has been growing dramatically over the last three years since 2002/03. In 2003/04, for instance, it has grown from USD 0.59 million in 2002/03 to USD 2.34 million depicting 296.6 percent growth rate. In 2004/05, 2005/06 and 2006/07 the cut flower export has grown by 234.6 per cent, 178 percent and 173.7 percent clearly higher than the total export growth of 36.7 percent, 16.9 and 6.9 percent, respectively.

It is estimated by EHPEA, that about 100 tones of horticulture and floriculture products are exported to Europe every day. Of which 60 percent are estimated to be cut flowers. (Addis Zemen, 13 February 2006).Although free market policy and investor friendly investment codes are claimed to have been in place since 1992 no significant production and export of cut flower has been witnessed in the country up until very recently. However, after the year 2002/03 the industry began to register remarkable performance. This was the period when significant policy changes have been observed in the investment code and, access to land for investors, improved lease rate, less bureaucratic hurdles, friendly credit arrangements for foreigners, and provision of other infrastructural facilities (telecom, electricity, road, etc).

Owing to the above policy adjustment measures, dramatic growth in production, export, foreign exchange earnings and employment have started to register since 2002/03. It can also be said that the export growth is FDI led, for a significant proportion of investors in the industry are foreign in their origin.

2.4. The Market Shares

In Ethiopia, the sales arrangements of cut flowers are carried out in the following two forms:-
Direct sales: contract base sales, consignment sales and negotiated sales; and sales at the Auction Market.

<i>Year</i>	<i>Weight in KG.</i>	<i>Value ETB</i>
1999	274,341.00	3,627,389.00
2000	189,141.00	3,132,174.00
2001	6,124.00	1,309,672.91
2002	11,877.00	231,302.60
2003	33,908.00	3,116,647.53
2004	202,877.00	7,088,619.03
2005	3,527,667.55	101,476,738.84
2006	9,137,082.87	321,547,395.14
2007	18,235,012.20	787,440,383.79
2008	25,470,434.33	1,197,976,217.48

Table 4; - Ethiopian flower exports, 1999-2008

Source;- Own Computation from Custom Database

The market share of a country' export in the world trade depends on its export to the rest of the world. Table 3 depicts the market shares of Ethiopian cut flower in the world and African cut flower exports.)

Country	1992	1998	1999	2000	2001	Ave. Share (1998-2001)
Ethiopian Export	1.68	0.46	0.35	0.84	0.89	2.54
of Africa(%)	1.26	0.18	0.13	0.31	0.30	0.23
of World(%)	0.005	0.011	0.009	0.023	0.024	0.02
Kenyan Export	61.48	131.55	141.33	144.44	165.34	582.66
of Africa(%)	46.07	51.28	54.13	53.65	55.14	53.62
of World(%)	0.187	3.221	3.749	3.919	4.542	3.84
Netherlands Export	2153.56	229.6	2095.18	2003.39	2027.93	6356.1
of World(%)	6.56	5.62	55.58	54.36	55.71	41.87
African Export	133.46	256.52	261.1	269.21	299.84	1086.67
World Export	32831.7	4084.36	3769.44	3685.75	3640.14	15179.69

Table 5 Export Market Shares of Ethiopia, Compared with Kenya and Netherlands (Value in million US Dollars

Source: Data from Pathfast Publishing and Author's Computation

The market share of Ethiopian cut flower export both at the world and African levels is increasing over time, especially since 2003/04. It is estimated that the share of Ethiopian cut flower has far improved from its 2001 level of 0.3 and 0.024 percent to 3.5 and 0.5 percent in 2005 in Africa and the World, respectively.

But very recent data shows as Ethiopian market share in the world cut flower has surpassed 1 percentage point. In addition to the domestic enabling environment for investors and favorable climate, the improvement in the Ethiopian share in the world cut flower is attributable to external factors including: the rising costs of labor in the EU leading to the decline in production of cut flowers in the EU, declining production area in the EU, decreasing number of growers and a shift away from cut flower to vegetables. In the Netherlands, for instance, the area under green house has decreased from 3757 hectares in 1998 to 34 27 in 2003 [CBI, 2005].

2.5. Key Stakeholders in the Ethiopian Flower Industry

2.5.1. Government Offices

I. Ministry of Agriculture and Rural development (MoARD) – Animal & Plant Health Regulatory Directorate.

The Directorate is the National Plant Protection Organization of Ethiopia. Concerning the floriculture industry, the 2001 Ethiopian Fiscal year performance report of the directorate among others declares that consultation, training and advisory services have been provided to growers on IPM, It has also revised, prepared and disseminated pesticide documentation for growers, prepared pesticide quality certification and residue analysis project documents, manual, lab and related equipment specification for procurement, and conducted of analytical activities.

II. Ethiopian Horticulture Development Agency (EHDA)

The Ethiopian Horticulture Development Agency (EHDA) is an autonomous Federal Government institution established by the council of Ministers Regulation No. 152/2008 under the umbrella of the Ministry of Agriculture and Rural Development. With a mission of promoting and facilitating the involvement of both commercial farmer investors and out growers in the rapid and sustainable development of the sector so that the country becomes

the leading producer and exporter of horticultural products in Africa and that all industry participants and the Ethiopian public benefit from the activities of the sector.

Moreover, under the proclamation the agency is responsible among other to:-

- Prepare a strategy which will ensure the fast and sustainable growth of the horticulture sector and after ministry approval implement this strategy.
- Cooperate with concerned bodies to encourage the development of a high quality trade infrastructure and the expansion of support service and institution.
- Establish a forum of consultation with the horticulture association and other stakeholders to design a plan and coordinate the support for the development of the horticulture sector and to follow up the implementation of the agreed programs.

III. Ministry of Labour and Social affairs (MoLSA)

The Ministry of Labour and Social Affairs as the name entails is a government organization responsible for the labour and Social concerns of the country. From labour point of view, in accordance with the Labour Proclamation No. 377/2003 the ministry is entitled to

IV. Ministry of Trade and industry (MoTI)

V. Environmental Protection Agency (EPA)

The Authority has the responsibility of assessing the environmental impact of investment projects. The assessment is supposed to include both social and economic impact. Due to the limitation of the 2002 proclamation establishing the Authority, by September 2009 an assessment schedule for establishing flower farms was announced and endorsed.

2.5.2. Workers & Employers Organizations

I. The Confederation of Ethiopian Trade Unions (CETU)

The Confederation of Ethiopian Trade Unions is established with a grand objective of safeguarding the rights and interests of Ethiopian workers. The confederation is the only umbrella national center for nine industrial federations in which the National Federation of Farm, Plantation, and Fishery & Agro-Industry Trade Unions (NFFPFATU) is the largest and perhaps the strongest among the

affiliated nine federations. NFFPFATU represents the agriculture and agro-processing sector which includes horticulture sub-sector. So far the Confederation has been involved in tasks of Training, and advocacy works at national and international forums.

II. The National Federation of Farm, Plantation, and Fishery & Agro-Industry Trade Unions of Ethiopia (NFFPFATU)

The National Federation of Farm Plantation Fishery and Agro Industry Trade Unions (NFFPFAITU) was re-authenticated in 1995. NFFPFAITU is an umbrella organization consisting of one hundred twenty six (126) basic unions having more than one hundred twelve thousand (112,000) fellow members. The federation has a general objective of assuring workers in the Farm, Plantation, Fishery, and Agro industry Sectors are unionized and their rights, benefits, and safety are protected, It has an independent constitution and internal procedures that would help to attain its objectives.

III. Ethiopian Horticulture Producers and Exporters Association (EHPEA)

Like any other employers association, EHPEA is established with an objective of representing the interests of the sector in the international market place & nationally, initiating & participating in horticultural projects in a bid to expand size & scope of the sector, lobbying the government and other stakeholders regarding policy, regulatory & other issues.

2.5.3. Civil society Organizations

Apart from government offices and workers and employers organizations, there are a number of civil society organizations that are active in the horticulture sector. Civil society organizations monitor the use of natural resources such as land and water as well as the use of agro-chemicals and its impact on the environment. Moreover, for some of these organizations labour right conditions is their primary objective, in others is not their mandate but is an interest area of concern.

1. Forum for Environment (FfE)

FfE is a national NGO serving as a platform of environmental communication and advocacy among different stakeholders. FfE has a vision of envisaging a sustainably developed

Ethiopia through bringing about environmentally literate, conscious & accountable citizens. Moreover, FfE has been involved in a number of environment pertinent programs such as green award program, establishment & empowerment of local groups, public engagements, researches & publication and networking.

2. *Fredrich Ebert Stiftung (FES)*

FES has been involved in the industry as part of its organizational objective. It has been implementing a number of activities such as ; Training for both employers and workers and their union.

3. *National Flower alliance (NFA)*

Six civil society organizations came together formed the National Flower Alliance (NFA).The National Flower Alliance (NFA) (ie Forum for Environment (FfE), Organization for Social Justice, Panos Ethiopia, The Confederation of Ethiopian Trade Unions (CETU), Ethiopian Wildlife & Natural History Society and Ethiopian Women Lawyers Association (EWLA) aims to work constructively together with horticulture stakeholders and aspires to contribute to the sustainability, corporate and ecological responsibility of the flower industry.

3. Demographic Structure of the Sampled Workers

The East African Horticulture sector is labour intensive. This section of the study will define the demographic characteristics of the sector based on the data collected from the sampled farms.

3.1. Age Composition

Age category	<18		18-35		36-50		>51	
	M	F	M	F	M	F	M	F
No.	0	0	110	268	3	4	2	2
%	0	0	94.82759	97.76119	2.586207	1.492537	1.724138	0.746269

Table 6:- Age Structure of Respondents

Finally, with regard to the age structure of the labour force a very young labour force is evinced from the survey. The majority of the workers selected, 272 (70.83 %) fall in to the 18-35 category of their life cycle. Comparatively speaking, the distribution of women of

different age groups shows that the percentage of young women in the age group of 18-35 years is higher (97.76%) than males in the same age category (94.82%), while with regard to the workers aged 51 and above, the difference is 1.44 %.

Generally, the age composition of the workers reveal that more than one third of the total labourers under study belong to the younger generation workers which is indicative of the fact that, by and large, farms in the flower industry opt to hire young workers, who are perceived to be more flexible and dexterous. The table further asserts that from the total worker respondents (384) workers with age between 18 – 35 constituted 98.43 % of both male and female respondents.

Marital Status

The majority of the cut flower workers fall in either the non-married or just married category.

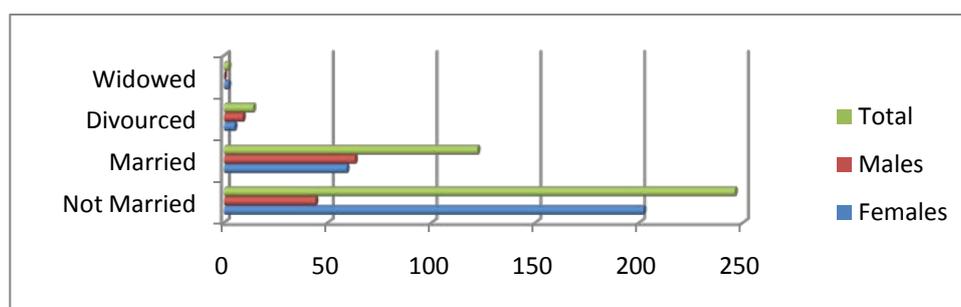


Chart 1; - Marital Structure

A union source also revealed that most of these workers are becoming sexual partners with each other and live together without having married due to the ever increasing inflation which made marriage ceremonies expensive. Thus, regardless of marital status, the number of single mothered women is becoming visible. Out of the total female respondents, 33 have at least 1 own child and 12 are single parents (2 divorced, 1 widowed & 9 not married), bringing up children alone and relying on family members to care for their children and sending up to 25 % of their monthly wage to their children care and support.

3.2. Sex structure

In addition to its labour intensive inherent nature, the industry is also known by its much gendered employment structure. However, only little can be said based on the information collected from the management about the different characteristics of persons employed in the flower-growing sector with the exception of their sex and wage. Traditionally, work in flowers has been associated with an essentially female workforce. The first data on gender suggests that participation of women is of the order of 70 percent of total employment;-

Workforce Statistics Based on Sex distribution						
No	Source Farm	Males		Females		Total
		No	%	No	%	
1	A	181	35.07752	335	64.92248	516
2	B	276	21.97452	980	78.02548	1256
3	C	115	29.18782	279	70.81218	394
4	D	202	25.99743	575	74.00257	777
5	E	298	28.76448	738	71.23552	1036
6	F	233	38.96321	365	61.03679	598
7	G	276	33.05389	559	66.94611	835
8	H	191	29.9373	447	70.0627	638
9	I	163	28.90071	401	71.09929	564
10	J	248	27.89651	641	72.10349	889
11	K	182	25.03439	545	74.96561	727
12	L	67	23.10345	223	76.89655	290
13	M	80	28.16901	204	71.83099	284
14	N	192	26.01626	546	73.98374	738
15	O	136	36.95652	232	63.04348	368
16	Total	2840	28.65792	7070	71.34208	9910

Table; 6 - Sex structure in the sampled farms

From table; 6 we can understand that female workers constitute about 2/3 of the workforce. From a similar vantage point, the concentration of female workers in individual farms ranges between 61.03 – 78.02 %. However, on average females constitute 71.34% of the workers. Furthermore, the study revealed that, the sector is characterized by the prevalence of sex based division of labour. Table 7 depicts this portrait of the sector. The more delicate tasks such as, seeding, tapping, tacking and grading are carried out by women, while soil preparation, fumigation, construction of infrastructure, cold storage, supervision and technical assistance are entrusted to men. In addition, interview with managers revealed that being considered more caring in the handling of the flowers, women are preferred than their male counterparts for being more stable in their work habits and for having a lower turnover than men. Production workers (Green House, Pack house, and Fumigation, including Security unit workers) represented 90 per cent of the total staff and the remaining 10 per cent represents Office service employees (Finance, Administrative (warehouse heads, security heads..) and Support workers).

The most labour intensive were the production (35% of workers) and pack-house/grading (23% workers) sections of the farm. At the production level, flower-growing tends to generate low-skill employment. Initially, flower-growing was handled by illiterate workers and education was not an important variable. Enterprises did not have any requirements with respect to schooling in the recruitment of production workers. The requirements were limited to the skills used in the operations of each worker. This was clearly reflected in the

educational level of the workforce. However, recently farms have shown a preference for workers who have some level of education (can at least read & write).

Task	Involvement by Sex deferenciation
Flower selection	Females
Classification	Females
Packing	Females
Flower arrangements	Females
Fumigating	Males
Construction & Infrastructure installation	Males
Tending flower beds	Mixed
Plant Cultivation	Mixed

Table 8: - Sex Based division of labour

Table 7 entails that, most of the production activity in the industry is exclusively assumed by female workers while those jobs which demands exertion of muscular force are left for male workers. Female workers were found to be distributed in various sections or departments of the farm. Such females' exclusive domain segments include harvesting, grading, packing and flower arrangement. Most of the female workers were in the production and harvesting section of the farm (57%) and about 41% were in the pack-house/grading section. The rest were distributed in cold rooms and fertigation (2%), maintenance (2%), harvesting (8%), office (4%), and others (2%). Men are mainly involved in the spraying, irrigation and maintenance sections of the production process. About one quarter of the male workers were in the spraying section (28%). The rest were almost equally distributed in the cold rooms, (20%), techniques (20%) and irrigation/ fertigation (20%) sections. Only 2% of the male workers were office clerks.

Puzzled with this unique nature of the industry, at the middle of the data collection an attempt was made to find out whether it is due to workers preference of particular jobs as an expression of their sex differentiation or otherwise. Accordingly, it is discovered that it is the management, which prefer such an arrangement due to the fact that "most of the activities in flower production require meticulousness and commitment which is often thought to be more pronounced in women than in men" (*Manager of a sampled farm in Zeway*). However, the study team would like to call attention of stakeholders to investigate the real essence and implications of the observed sex based division of labour in the sector. What the research findings point out is that due to the perceived meticulous status of females, they are concentrated in low paid jobs and are not given the opportunity to be promoted to upper positions such as Group leaders, supervisors, etc

3.3. Educational Structure

Education is an important tool for vertical mobility in the working life. Low levels of education in a situation of extremely limited employment opportunities are major constraints on securing employment in general and better wage in particular, particularly for women. Nevertheless, among the flower workers under study, 7% are illiterate (who have never gone to formal schools) 18% attended primary school. It is evident that selected worker respondents in sampled farms have attained education beyond primary school level (57%). Notable is the fact that, of the workers sampled, a slightly higher number (19%) have certificate, diplomas or degree.

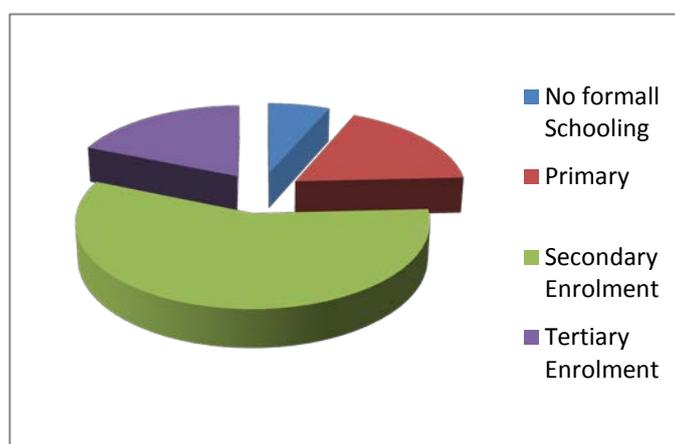


Chart 3: - Educational Attainment Structure

Hence, the levels of literacy among workers under study found to be higher. For instance, as regards the query on the highest level of educational attainment, among the 384 workers in the in-depth exploration, 57 percent of them reported that they attained high school class. Indeed, irrespective of having received schooling for one or two years, a significant proportion of them showed high interest of joining schools at least to graduate from high school.

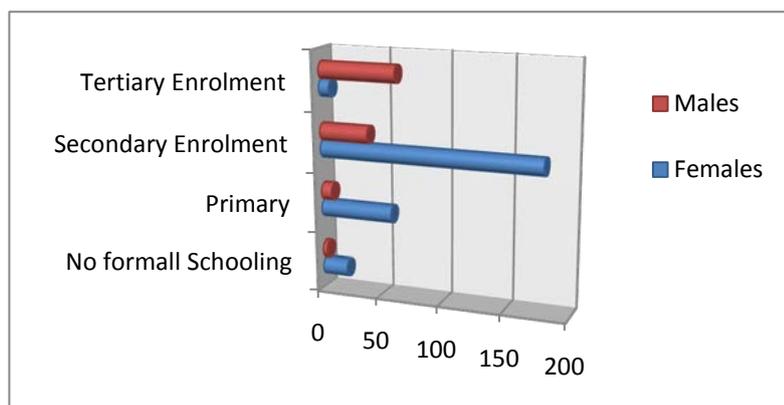


Chart 4: - Sex Based Educational Structure of Worker Respondents

4. Labour Right Conditions

4.1. Freedom of Association and Collective Bargaining

Freedom of association and the effective recognition of the right to collective bargaining are the foundations for a process in which workers and employers make claims up on each other and resolve them through a process of negotiations leading to collective agreements that are mutually beneficial. For workers, engaging in collective bargaining entails coming to terms with the reality of the market in which the enterprise competes. Establishing and deepening confidence in constructive labor relations is thus a key factor in the promotion of the principles and rights of freedom of association. Apparently, one of the key elements for the effective recognition and promotion of the right to collective bargaining is legislation that allows representatives of workers' organizations to be recognized for purpose of bargaining and contains other facilitative provisions.

In this respect, freedom of association and the right to collective bargaining is legally recognized and covered through different legal instruments in Ethiopia. The constitution of the Federal Democratic Republic of Ethiopia declares that international conventions ratified by Ethiopia are parts of the national law. And under Article 42 it is explicitly declared that agricultural workers have the right to organize in trade unions. Furthermore, the labour proclamation re-affirms the matter under discussion in a very detailed fashion. Nonetheless, the study identified a number of discrepancies in this regard in the flower industry.

Accordingly, 180 (46.87%) of the respondents expressed their feeling that exercising their vested labour right in general and being elected official and/or active union promoter will pose a threat to their employment. Furthermore, they have explained that dismissal of union leaders & active union promoters and denial of union meetings in workplaces during working hours are some of the common pitfalls on freedom of association.

An evaluation of workers attitude towards their union elected officials and the respective unions was also an interest area of the study. As a result, it was evidenced that most of the responding workers 368 (95.83%) have exhibited a positive sentiment towards the existing union and elected officials or agreed that the existing union represent workers interest adequately.

From a gendered perspective, it was discovered that women are the strongest union supporters with a score of 98% while only 72% of male work agree or strongly agree that unions represent workers interest. At this vantage point it can be purported that the vulnerability of female workers made them strong supporters of the union regardless of their insignificant representation in the union leadership circle.

A related notable finding of the study is that even if women represent $\frac{3}{4}$ of the workforce in the industry their representation in the union leadership is quite minimal. In the sampled farms out of the expected 75 core union leaders only 15 (20%) are female are in the union leadership circle. Information from the federation revealed that about 53 workplaces with over 31,300 workers are already unionized and affiliated to the federation.

Finally, through the study it became evident that for workers to join trade unions is due to the possibility of entering in to collectively negotiated agreement establishing mutually accepted and consented terms and conditions claimed by 261 (67.96%) of the respondents. However, out of the 15 sampled farms only 3 (20%) have negotiated and signed collective Bargaining Agreements as a result, most of these unions lack avenues for collective bargaining or defense in case of unfair dismissal. 5 of the farms have been criticizing and accusing workers' unions of inciting workers to take punitive industrial action in demanding wage increments and better conditions of work. Therefore, farm owners/ managers have been reluctant to cooperate with the unions.

4.2. Conditions of Employment

It is a common practice in the cut flower industry for workers seeking employment to assemble at the farm gate every morning in search of a job. The manager or representative of the manager would then come and hand-pick the number of workers he or she requires for the day. The persons picked will then be employed under daily labour status and with time may either become fixed term or permanent, depending on the 'satisfaction' of the management with the worker's performance. It may also result in the loss of the job if management considers the new employee's work 'unsatisfactory'. In the farms visited, about (300) 78.12 % of the workers had introduced themselves at the farm gate to acquire their job. Another 54 (14.06%) had responded to an advertisement and were invited for an interview.

4.3. Employment Security

According to the national labour code, any verbally entered employment agreement shall be translated in to written form within 15 days. If not the verbal agreement shall be deemed entered. Therefore, it does not create any problem whether an employment agreement is in written or otherwise. Most of the workers in the farms were employed either as daily labourers with written contract (28%) or daily labourers without contractual (35%) terms of employment. Only about 27% of the workers were permanent and hence entitled to the benefits of drawing a provident fund allowance payable when employment is terminated. These workers had a signed letter of acceptance of the terms and conditions of employment under this category, which acted as their contractual agreement with the employer. The rest of the workers (10%) did not know under what terms they were employed, largely because they may not have signed any contract with the employer.

4.4. Working Hours and Overtime

According to the Labour proclamation No. 377/2003, formal working hours are 8 and 48 hours of work per day and week respectively, with a successive 24 hours of rest after every six days worked and overtime is allowed in a very narrowly defined circumstances and is voluntary. The majority (79%) of the workers interviewed work 8 hours a day. About 11% work 7 hours a day and another 5 % work for as many as 9 hours a day. Over half (56%) of the workers indicated that they work overtime, especially those engaged in harvesting and packing, and this is compensated in cash. However, on all farms overtime is generally

compulsory. Workers in other departments were also required to work overtime and are particularly common at ‘pick seasons’ such as during Christmas, Valentine’s Day and Mother's Day when pack house workers are under great pressure to pack flowers for the daily flight schedule and it is revealed that 11 of the farms’ respondents claimed to be working 11-12 hours per day at these peak times. More female respondents 196 (73.13 %) were involved in overtime work, which can have serious implications as they have dual responsibility (workplace and home). With respect to overtime compensation, most workers complain that they are not being compensated in accordance with the national labour law. To this end, an attempt was made to investigate either workers are compensated or otherwise. Accordingly, we have found a mixed result in 5 of the sampled farms, quite recently the management introduced a system of “compensating” for overtime jobs in such a way that workers who participate in overtime job will be compensated a total of 2 hours remuneration regardless of the number of hours they may work overtime.

<i>ILO conventions</i>	<i>ICC</i>	<i>MPS</i>	<i>FFP</i>	<i>FLP</i>	<i>EHPEA CoP</i>
Freedom of association and	X	X	X	X	X
Equality of treatment, health and	X	X	X	X	X
child labour	X	X	X	X	X
Forced labour	X	X	X	X	X
<i>Wages</i>					
Respect minimum wages	X	X	X	X	
Wages sufficient for living	X	X	X	X	
Respect CBA					X
<i>Working conditions</i>					
Limited working hours and overtime	X	X	X	X	
Promote permanent labour	X	X	X	X	
Secure pesticide use	X	X	X	X	X
Provide staff facilities				X	X
Mechanism to prevent harassment				X	X
<i>Others</i>					
Organize training on social issues					X
Social premium					

Table 8: Social content of the private labels and codes

Similarly speaking, participants in three of the Focus Group Discussions participants complained that overtime is not voluntary and that they are not given the opportunity to refuse in accordance with the international convention and the labour code. Moreover, in both instruments (interview & focused group Discussions) workers indicated that there is no awareness of how many hours per week are allowable under the law. Furthermore, it is also

revealed that overtime is issued in a short notice. Employers claimed that such long hours are partly a function of the seasonality of the industry. However, it is important to state that compulsory and short notice overtime is also a function of the consumers (retailers) behavior where buyers demand that exporters respond swiftly to fluctuations in consumer demand. Managers have stated that they prefer selling to auctions than direct sales.

All companies reported paying employees overtime based on the labour code. But 103 (26.82 %) workers respondents indicated that they are not paid overtime. 96 (25%) workers claimed to have been given days off in lieu of wage compensation. Generally, there is sizeable confusion on matters of overtime payments among workers and most workers are not very familiar with how it is calculated.

4.5. Leave (Weekly, Annual, Maternity, ...etc)

According to management sources, almost all the workers (97%) had a day off per week. Of these, two thirds were paid weekly rest. Managers in 4 sampled farms revealed that, only permanent employees or those on fixed term temporary contracts are entitled to a weekly rest. According to this similar source, almost all employees (94%) are entitled to paid annual leave. The number of annual leave days is 14 days for the first service year and additional one day for successive years. However, information from worker respondents declares that only 44% are entitled to paid annual leave; 56% of the workers were not entitled to annual leave. And (253) 52% of worker respondents claimed that they get un-paid one day weekly rest and (131) 34% have no weekly leave at all.

More than three quarters of the workers (75%) reported that they are entitled to paid sick-leave days according to physicians' recommendation. The rest were entitled to unpaid sick-leave days (15%) or none at all (4%). About 6% of the workers did not know whether they were entitled to sick leave or not.

The number of sick leave days varied with the type of sickness and the number of days recommended for rest by the doctor/nurse.

Only 41% of the workers interviewed reported that they are entitled to paid maternity leave, while 23% are entitled to unpaid maternity leave, 15% did not receive maternity leave and another 21% don't know either they are entitled to maternity leave or not.

4.6. Wage and other benefits

Wages are the most important element in a desirable job, and therefore in its quality. It has always been conceded that the flower sector pays above average wages in the agriculture sector. The majority of workers earned a monthly salary of between 10 – 15 ETB (0.83 – 1.25 \$ USD) for the formal 8 hour working day or 300 – 450 ETB (25 – 37.5 \$ USD) for a 192 formal working hours. There was no variation in wages earned by male and female workers. Over the past one year period in all farms there was an improvement in monthly wage (which was formerly between 6-8 ETB). However, given the ever increasing price of subsistence consumer goods there is a significant gap in workers' ability to afford their basic needs and the wage they earn. As a result, most workers found it difficult to meet their daily needs with the meager wage they earn and saving and investment by these workers is almost nonexistent. Two farms offer a provident fund of 11 and 10 % for their permanent workers and one of these farms also cover 75% of educational expense for workers.

4.7. Access to basic utilities (Latrine & Potable water).

About 78% of the workers reported that the farm provided them with pit latrines, while 13% had access to flush toilets and another 9% had access to both pit latrines and flush toilets. Most workers found these facilities to be adequately clean. However, over one quarter of the workers felt that more needed to be done to make the facilities more hygienically clean and hence usable.

It was revealed lack of adequate latrine facilities for a vast majority of the sample farms the distribution was found to be 45 latrines to 15 farms. Yet, it has to be seen also in the context of lack of access to adequate potable water supply facilities and other measures for their proper upkeep 131 or 34.11 % of the respondents claimed that they fetch potable water from their home for consumption during duty hours. However, about 23% of the workers in the sampled farms had access to quality drinking water on the farm provided by the employer. In 88% of the cases, there were taps provided for washing hands after visiting toilets. In 3% of the cases, buckets were provided. However, 14% of the workers had no facilities for washing hands after visiting toilets. A majority 63% of the workers interviewed found the washing facilities adequate and conveniently positioned. In most cases a tap or bucket is positioned

next to the toilet facility. Moreover, due to the fact that most of the farms are located in the outskirts of towns, provision of transport service for workers is we believe of paramount importance. Nonetheless, from the sampled 15 farms it was found that only 2 of them provide transport service. As a result, most workers especially female workers claim that either reporting on time or arriving home safe/timely to carry out domestic responsibilities is a big challenge.

4.8. Grievance Handling Procedure

Workers do not usually come face to face with the owners except during meetings where all employees are asked to attend. Meetings are often between the workers committee and the management and workers do not get the chance to meet with the owners of the farms. Workers reported that the supervisor might threaten to dismiss, suspend or transfer the worker to other departments or to report them to the managers if they do not put more effort into their work.

When an employee commits an offence, the matter is first reported to the supervisor who then may report to the manager depending on the seriousness of the offence or when the worker has already been warned several times. Some of the workers reported that fellow workers had verbally abused them. But, one worker reported that fights amongst workers may not necessarily start from their work place. Some may be due to misunderstanding at their place of residence due to theft, relationships or failure to reimburse money lent to them.

4.9. Occupational Health and safety

Approximately 66% of the workers reported that their employer provided basic medical care for them. The type of care provided included out-patient (27%); in- and out-patient (15%); out-patient and first aid (44%); in-patient (14%); and a combination of in- and out-patient, plus first aid. Most of the outpatient treatment was received from the company facility. However, in some cases, the employers paid for medical services in private health facilities because the company did not have a health facility. Nonetheless, most workers (86%) complained that while they are sick it is difficult to get access the medical attendance and moreover they also expressed their dissatisfaction on the treatment they receive in the clinic (referral hospital).

About 58% of the workers reported that there was a health and safety officer on the farm and their work was to make sure that the environment was kept clean, and that workers received proper medical care. However, only 49% of the farms had a health and safety committee in workplace fully organized by employers and unions are not represented. This committee is charged with ensuring that the working environment is clean and also that the health concerns of workers are addressed. This committee works together with other committees such as the welfare and workers' representative committees and has regular meetings with the management to discuss matters affecting the health and safety of employees.

The horticulture industry in general and the flower industry in particular is notorious for the misuse of chemicals. To this effect, an attempt was made to understand the practice of observance of re-entry intervals. Concomitantly, it was ascertained that spraying is practiced from after 4pm local time when workers are supposed to disembark to home. However, workers reported that in some cases spraying has been administered in quarters of the greenhouse while other greenhouse workers are on duty. Moreover, some spray workers reported that there are containers where there is no label tagged on it to mention the often referred chemical BN3 (No label with a 20 liter white plastic barrel).

It is found that only a small proportion of workers had been trained on various issues of health and safety on the farm. This was distributed as follows: working safely (11%); correct chemical application (14%); use of protective clothing (14%); chemical storage (8%); and record keeping (3%). These results imply that the workers are not fully aware of how to handle the chemicals they use and the risks involved in handling these chemicals. The workers are thus at risk of being exposed to the chemicals hence affecting their health. It is thus important to instruct and train the workers, especially the spray operators, on the safe application and risks of pesticides and chemicals.

Of the 116 male workers interviewed, 40 (34.48 %) work in the chemical department, namely 2 Spray Supervisors, 2 Chemical store Keepers, 2 Chemical mixers, and sprayers. An attempt was therefore made to find out which items were given to them as part of protective clothing. Accordingly, from the above 40 chemical department workers, 34 of them were chemical sprayers and the following table depicts the provision of PPE for these chemical applicators;-

<i>Type of the PPE</i>	<i>Yes</i>		<i>No</i>		<i>No Answer</i>	
	<i>No</i>	<i>%</i>	<i>No</i>	<i>%</i>	<i>No</i>	<i>%</i>
Respirators	23	57.5	9	22.5	8	20
Overalls	32	80	3	7.5	5	12.5
Gloves	25	62.5	7	17.5	8	20
Rubber Boots	32	80	2	5	6	15
Impermeable Goggles	15	37.5	20	50	5	12.5

Table 10; Protective Clothing provision for Chemical applicators.

As clearly seen from the Table, A majority of the chemical spraying workers were provided with respirators (57%), overalls (80%), impermeable gloves (63%) and rubber boots (80%). However, only 37% of workers interviewed were provided with impermeable goggles. This means that the majority of workers are exposed to possible eye injury from the chemicals.

Only 33% of the farms had a health and safety officer who is professionally trained and in charge of keeping the environment clean and making sure workers were safe as they worked in the farm. Similarly, only 7% of the farms reported the existence of a health and safety committee. These farms are the only ones in which by definition work place joint Health & Safety Committee is established with the participation of trade unions. This scenario is worrisome given the fact that only a very small proportion of the workers had been trained in health and safety and awareness of the dangers they may be exposed to in the course of their work

Among chemical handlers, less than half of the workers reported that they had received some training in the use and handling of chemicals. Fifty percent had been trained in working safely, 31% in correct application of chemicals, 8% in use of protective clothing, 25% in storage of chemicals and 22% in record keeping. Generally therefore, this depicts very low levels of training especially in the use of protective clothing.

All the farms visited provided washing and changing facilities for the workers who are spraying. After spraying the flowers, the workers wash themselves and sometimes their clothing at the facilities provided. However, the frequency of medical check-ups for sprayers was varied. The majority reported that they received these check-ups on a quarterly basis (81%). Although others were as frequent as weekly or monthly (8%) some had not received check-ups in the last year. A few of the workers (4%) reported that the check-ups were unscheduled.

4.10. Sexual Harassment

Defining sexual harassment from a wider perspective in such a way that it covers, unwanted jokes, gestures, offensive words on clothing, and unwelcome comments and repartee, touching and other bodily contact such as scratching or patting a coworker's back, grabbing an employee around the waist, or interfering with an employee's ability to move, repeated requests for dates that are turned down or unwanted flirting, transmitting rumors of sexual in nature and displaying sexually suggestive objects, pictures, or posters.

Accordingly, the study found that over 24 % of women respondents have witnessed that they have been the victims of sexual harassment either by their male counterparts or immediate bosses. (Sexual harassment is here defined as unwanted jokes, gestures, offensive words on clothing, and unwelcome comments). If we widen its emporium to out of the work places the % will be as high as 90%. Similarly 13 % of female respondents said that they had been asked out by their bosses or supervisors, who offered to improve their jobs in exchange.

4.11. Training

In the accepted merit based management system, so far as job positions and related wage system is determined by education level and work experience, training is an indispensable element of one's career life. Training and/or performance- based appraisal system was identified by most companies as key to improving productivity, quality and efficiency.

According to the management's information, the majority of the workers had never been trained in health and safety (85%). Of the 15% that had been trained in health and safety on the farm, a significant proportion had been trained on material and chemical safety. Others were trained in First Aid, emergency and casualty procedures. However, interviews with workers indicate that only 23 % of the interviewed workers received trainings and/or opportunities to improve their skills on the farms. Moreover, 33 % of the respondents said that they would like to have more training in the packaging of flowers in order to master new techniques and avoid the possibility that they would face due to failure of being as per the required standard.

Managers interviewed in 7 farms stated that they had informed their workers about their basic duties and rights through meetings. However, many of the workers interviewed said they had not heard about their rights and responsibilities as enshrined in international and national

legal covenants from the management. More than half (54%) of the workers on the farms did not know about their rights and responsibilities as enlisted in their job description. Of those who reported that they were aware of their rights and responsibilities, only 25% could enlist at least three provisions. Nevertheless, they had some knowledge of the issues addressed by the labour codes such as protective clothing, medical care and provision of maternity and annual leave.

5. Gender Dimensions of Conditions of Employment

This section provides an initial mapping of gender issues the horticulture industry of Ethiopia. It is apparent that the Horticulture sector is expanding extensively which generates significant levels of local employment, a high percentage of which is female. Women in this sector are predominantly concentrated in non-standard employments - fixed term and daily labour contracts which entails low wage and a high degree of insecurity in the terms and conditions of employment. In contrast, men tend to be concentrated in standard employments - permanent employment contracts, which enjoy greater security and generally higher wages. To this effect, this particular sub-section of the study dwells specific attention to the gender dimension of the industry.

5.1. Women Workers and Occupational Health & Safety

Occupational health includes the environment and the conditions in which the worker spends the majority of his/her time. These conditions are often occupation specific and hence vary in their impact on the worker. The occupational health issues of women workers of the horticulture industry are assessed from their awareness of:

- The hazards faced in doing their work
- The ailments experienced as a result of their job requirement
- Problems faced during pregnancy and their menstrual cycle
- Accidents that occur at their site of work
- Safety measures and safety training given.

We found very little awareness about health hazards among workers and unions, a state which management policies also seem to perpetuate by not providing any information on occupational health & safety. When women respondents were asked about the hazards at

work, 44 percent of the women respondents said they had no problems, while 41 percent mentioned the possibility of chemicals hazards while at work. 1/4 of the female respondents identified repetitive strain and backache due to working long hours either standing in pack houses or bending in harvesting. Moreover, health problems of women are also related to working in one position continuously like bending, crouching, sitting or standing for several hours every day, over a period of time. These postures result in backache, injury of the spinal cord, aches and pains in joints and shoulders. Of the total respondents 57 percent have to stand all day to do their job. Over a third of respondents have to stand while working while the rest said that their work involves both standing and bending.

This means that 93 percent of the female workforce as represented by this sample is engaged in work that makes them stay in one position continuously for the entire work time. In the case of standing, this can lead to varicose veins, back pain. We have been informed by female workers that a large proportion of women experiencing menstrual problems were also related to their posture during work, i.e. whether they were only standing or only sitting.

5.2. Trainings

One major barrier to women being promoted is their lack of access to education and training opportunities. Over 87% of the women interviewed had never received training of any kind. Comparing men and women we see that more than three fourths of the men received training (35%).

Training across sex reveals that a good percentage of women in CBA signed farms (43%) received training compared to women workers in non-CBA signing farms (8%). As for men, 24% of workers in farms without CBAs received training, compared to 38 % in farms with CBAs. The proportions of men getting training in both types of farms exceed that of women. This is because training is given to mainly man-staffed jobs such as sprayers and because of women are not given the opportunity and/or the object it.

Types of Training Female respondents who received training, when asked about the type of training received on the job reported essentially four types:

- HIV/AIDS
- First Aid &
- Reproductive Health.

An insignificant proportion of women reported receiving skilled training (9%) compared to those receiving basic training (21%)

Training by CBAs Presence Findings indicate that access to training is lower in absence of signed & negotiated CBAs situations for both men and women. What this reflects essentially is that training of workers and choice of who gets this training is a management prerogative and male union leaders in the case of trade unions organized trainings.

Second, even where there is signed CBAs access to training a greater proportion of men get training relative to women. This reflects that there are barriers to women getting training, which could include male bias in choice of who gets training on the part of management as well as unions. Also the choice of who gets trained is adversely affected by the minority presence of women in the union leadership circle. In other words, in situations where more than one or two potential trainees are being selected, when faced with a large number of male union leaders (relative to women), males would in all likelihood be choose mostly men barring the token presence of a women. This reflects that the training should be made part of collective bargaining by the unions and stakeholders should consider in their advocacy of training should promote women and training should take into consideration wherever possible gender constraints to mobility

5.3. Overall Benefits for Women Workers

Respondents were asked which of the following benefits were given to them by their employers: medical benefits, housing and transportation /travel allowances, maternity leave, provident fund and gratuity. Women were also asked to list any other benefits that their companies provided besides the above. Overall, nearly three-fourths of the women surveyed were given bonus at least once in a year. Two-third got maternity benefits and paid leave. However, less than 1/5 got housing or travel allowances. A large majority (96%) got medical benefits. They way it works is that if the clinic/medical center say so, workers will get paid leave. However, as stated in OHS section in most cases it's difficult to get clinic visiting slips from management and referral papers from these clinics. And most workers complain about the service they are getting from farm-owned and contracted clinics.

For the farms without CBAs; benefits received were arbitrary and depended on personal judgment of the management. When asked about benefits one woman said, “I am told that if I quit the union only then will I get promotion. I was singled and denied promotion because I’m an active promoter of the union.” Yet another woman in the same company said, “If you are not pro union and sweet to the management then you get your benefits.

5.4. Promotions for Women Workers

Women’s lower wages get further reflected in the history of promotions they have had. Partly the number of promotions women get in the industry is a function of their age and educational background. The study reveals that 86% of the respondents had never been promoted. The rest 14% had experienced at least one promotion.

5.5. Provision of Basic Facilities

While the facilities available at work did not vary much by presence of signed CBAs, they varied widely by the type of facility available at the work place. Overall more women workers got access to facilities such as drinking water & toilets. However, the largest proportion of women had no separate toilets, yet there were 2 companies actually have separate toilets for men and women. Close to two thirds of the workforce had access to clean drinking water. A larger proportion of women workers in the industry don’t have access to washing facilities. Alarming in all the sampled farms there is no facility of rest room or child care facilities. One fourth of the female workforce interviewed reported access to a lunch room or canteen facilities. What this clearly reflects is the lack of attention paid by unions in the charter of demands to specific needs of women workers. In the bargaining process these facilities are often under--emphasized relative to wage demands which benefit all workers. This data shows that presence of negotiated and signed CBAs has made a positive difference. However looking at the overall proportions of women getting access to gender specific needs particularly restroom and child care we see that none of the female workers are getting these facilities. Therefore there is a strong need for unions to place greater emphasis on these neglected women specific needs.

6. Conclusion and Recommendations

6.1. Conclusion

Ethiopia's flower industry is the recent and fast growing in Africa. The industry is a source of direct employment for over 50,000 Ethiopians. More than 85% of Ethiopia's cut flowers are exported to Europe and they account for 8% of the country's total export earnings. Most of these flowers end up in the Holland auction while the rest is shipped to Germany, UK, Japan and Russia.

Recently Ethiopian growers and exporters started subscribing to codes of practice as a result of the growing concern of European consumers on the working condition and environmental safety standards. These codes are meant to help employers critique themselves and to ensure that the conditions under which the cut flowers production is environmentally and socially responsible.

The main purpose of this study was to examine labour condition in the cut flower industry of Ethiopia. This involved assessing the labour relation practice of farms against internationally and nationally accepted standards. The study findings will be used, among other things, to inform pertinent stakeholders for empirical intervention possible. The study takes a comparative gender approach between males and females conditions of employment in the flower farms. A total of 15 farms, fairly distributed cluster areas, were visited and workers and managers were interviewed. Actual selection of farms was done based on ownership, product type and to a limited extent, the location of the farm.

Historically, the agricultural labour force was constituted by the lowest sections of the social order that lived in great penury and deprivation. Conditions of life of the horticulture workers of Ethiopia do not seem to be different. The majorities of them live in appallingly poor conditions with high levels of casualisation, low wage ... etc. The prevailing aspects of better working conditions in the sampled farms was generally can be attributed to factors such as the consistent need or demand of unions for better working conditions and farm owner's/management's disposition.

6.2. Recommendations

Due to the fact that the prevalence of wide range of deficits, no single initiative may effectively and efficiently resolve the problems experienced in the cut flower industry in terms of decent working environment in the flower industry in Ethiopia. However, the following recommendations could be made to enhance decent work in the industry.

- As a matter of urgency, it should be require that wages of flower workers to be computed in relation to the prevailing price of subsistence goods in the market and the average expenditure patterns of average citizens. Thus making living wages became realized. Practicing social dialogue at workplaces, national and international level could serve as the initial step towards ensuring productivity & enhanced competitiveness of the farms and provision of living wage for fellow workers.
- Extending awareness creation & capacity building education and trainings of flower workers on a number of issues shall be considered among the first line of intervention by different stakeholders. In order to empower the workers to assert their rights without permanently being reliant on outsiders to fight on their behalf. Workers require training in international and national fundamental rights at work that govern the working conditions and terms industrial relation. Most workers are already members to trade unions however; enhancing workers understanding & knowledge of their rights begins with general civic information about governance in Ethiopia which could be provided by basic trade unions who are being trained by the federation and are operating at their respective farms. However, this is a challenge as most employers do not encourage it.
- In addition, complementary strengthening of labour and social affairs office responsible for enforcing national labour laws, through training of officers, could also contribute to this effort.
- Only 17% of the workers interviewed directly use and handle chemicals ranging from pesticides, herbicides and fertilizers. However, all workers are exposed to chemicals as they handle plants or are in close proximity to plants on which the chemicals have been

used. Thus proper use and handling, as well as storage of all chemical materials on the farm are important to protect the workers from any injurious effects.

- Along with adequate provision of PPE for workers directly handling chemicals, there should be a general improvement in the provision of protective clothing for the workers and a crucial improvement in the proportion of workers that had been trained in health and safety.
- In the horticulture sector female workers constitute $\frac{3}{4}$ of the total workforce. To this end, ensuring socially sound horticulture sector calls for a coordinated effort of addressing female specific workers interests. To mention few recommendations in this line;-
 - Trade Unions should mainstream gender in the day to day trade unions activities. Promote women empowerment in to the union leadership so that female workers are adequately represented and their voice heard, incorporate female specific issues in to CBA negotiation, institutionalize policy & practice of affirmative measures, organize workplace women committees to serve as a bridge between female workers & trade unions...etc.
 - The Government shall induce schemes of effective and periodic inspection and supervision in a bid to making sure that internationally ratified and nationally promulgated women specific rules and regulations are adhered and respected.
 - Employers shall cooperate with workplace trade unions & women committees so that workplace rules, regulations, & practices take in to account women workers interest and condition such as the family & workplaces dual responsibility.

Finally, female workers' training is an indispensable tool to address their gender specific issues and interests. Be it adequate awareness on their right and responsibilities, paving an opportunity for promotion and its outcome of wage increment, proportional representation in the day to day deliberation of the workplace and empowerment, etc female workers training and education would play a pivotal role. Apparently, women's' training and education shall be vested priority consideration and coordinated intervention by stakeholders.

○ Annexes

I. List of Operational Farms

No.	Company Name	Product Type	Location
1	"A" Flower	Roses	Holeta
2	Abyssinia Flowers	Hypericum, Eryngium	Sendafa
4	Agri Flora P.L.C	Roses	Addis Alem
5	Alliance Flowers Plc	Roses	Welmera/
6	Almeta Impex Plc	Grape & Strawberry	
7	AQ Rose PLC	Roses	Ziway
8	Arsi Agricultural Mechanization	Roses	Welmera
9	Avon Flowers Plc.	Roses	Debrezeit
10	Awassa Green Woods Plc.	Vegetables, Horti Seeds, Roses	Awassa
11	Beauty Green P.L.C	Roses	Tulu Bolo-Mehal Amba
12	Blen Flowers Plc	Roses	Koka
13	Chibo Flowers	Roses	Chibo
14	Dire Highland Flower Plc.I	Roses	Holeta
15	Dream Flowers Plc.	Roses	Addis Alem
16	Dugda Floriculture Development Plc.	Roses	Holeta
17	DYR	Carnation	Teji
18	Eden Rose Plc	Roses	Tefki
19	Enyi Ethio Rose I	Roses	Kara kore / Addis Ababa
20	ET-Highland Flora Plc.	Roses	Sebeta
21	Ethio Agri-CEFT	Roses	Holeta
22	Ethio Dream Plc.	Roses	Holeta
23	Ethio Flora Plc.	Fresh green, Beans ,Papaya, Orange,	Adami Tulu
24	Ethio Plants		
25	Ethio Vegfru plc	Rucula & Beans	Koka
26	Ethiopian Cuttings	Geranium & Bedding Balcon	Koka
27	Ethiopassion	Roses	Sebeta
28	EWf		Sebeta
29	Euro Flora		
30	FIYORI Ethiopia Pvt.Ltd.Co	Roses	Holeta
31	Flowerma		
32	Florensis Ethiopia Plc.	Budding Plants	Koka
33	Fressia Ethiopia Plc		Sululta

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34	Garad Plc.	Roses	Welmera
35	Golden Rose Agro Farm Ltd.	Rose, Hypericum	Tefki
36	Herburg Roses Plc	Roses	Ziway
37	Holeta Rose Plc.	Roses	Holeta
38	ILAN TOT PLC	Strawberries	Koka
39	J.J Kothari Plc.	Roses	Sululta
40	Joe Flowers Plc.	Roses	Holeta
41	Jordan River Herbs Plc.	Roses & Gypsophilia	Menagesha
42	Joytech	Rose & Gypsophilia	Debrezeit
43	Ethiopian Medaws	Rose	Welmera
44	Lafto Roses	Roses	Addis Alem/ Sebeta
45	Linssen Rose	Roses	Addis Alem
46	LUCY Ethiopia Flowers Plc	Roses	Holeta
47	MAM Trading Plc.	Roses	Sendafa
48	Maranque Plants Plc.	Chrysanthemum cutting & Anastasia	Merti Jeju
49	Marginpar Ethiopia Pvt.Ltd.Co.	Eryngium	Menagesha
50	Menagesha Flowers Plc.	Roses	Menagesha
51	Meskel Flowers	Roses	Ziway
52	Metrolux Flowers	Roses, Summer plants and Lilies	Holeta
53	Minaye Flowers Plc.	Roses	Debrezeit
54	Mullo/ Derba Farm Plc.	Hypericum& Eryngium	Chancho
55	Noa		
56	Omega Farms Plc.	Hypericum, Lily, Limonium	Alemgena
57	Oromia Wonders	Roses	Menagesha
58	Rainbow Colors		Debrezeit
59	Red Fox Ethiopia Plc.	Un-rotted Cutting, Pelargonium, Pninsettia	Koka
60	Rose Ethiopia Plc	Roses	Holeta
61	Roshanaper Rose Plc.	Roses	Debrezeit
62	Saron Rose Agrofarm Plc.	Roses	Sebeta
63	Sathya Sai Farms		
64	Sheba Flowers Plc.	Roses	Sebeta
65	Siet Agro Plc.	Roses & Delphinium	Addis Alem
66	Spirit Plc.	Gypsophila, Solidago &Limonium	Debrezeit
67	Summit Plc.	Roses	Wenji
68	Super Arsitey Flower Plc.	Roses	Awash Melkasa
69	Supra Flower Plc.	Roses	Addis Alem

70	Tabor Herbs	Full basket of 20 herbs	Awassa
71	TAL Flowers Plc.	Gypsophilia & Limonium	Sebeta
72	Tepo Agricultural Plc.	Tomatoes, Onions etc	Meki
73	Tinaw Bussiness S.C		
74	Top Flower Plc	Roses	Holeta
75	Uni-Flower Plc		
76	Valley Farm Plc.		Meki
77	Yassin Legesse Johnson Flower	Roses	Debrezeit
78	Zaguwe Flora		
79	Ziway Roses Plc.	Roses	Ziway
80	ZK Flowers		
81	Zubeka General Bussiness Flower		

II. List of Ethiopian Flower Customers