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Continuity and Rupture in Ethiopia under the Ethiopian People's Revolutionary Democratic Front

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Manufacturing and Labour Mobilisation in EPRDF Ethiopia. A Household Perspective on the Rise and Uncertain Prospects of the Textile Industry in Tigray

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Abstract

This article explores the relation between industrialisation and labour mobilisation in Ethiopia under the Ethiopian Peoples' Revolutionary Democratic Front (EPRDF). Addressing the recent history of the textile and garment industry in Tigray, the article discusses key moments of continuity and rupture in the way the Tigray People's Liberation Front (TPLF) leadership attended the historical question of how to diversify employment out of smallholder agriculture. Based on fieldwork conducted in Tigray's capital city Mekelle between 2015 and 2018, I argue that in the course of the 2010s rapid industrialisation under the impulse of the Ethiopian "developmental state' generated the question about how sourcing industrial poles with workers that were dispersed across the countryside, and with the prospect of initial salaries below reproduction. This generated a paradox: the coexistence of labour shortage and a large population seeking employment. This paradox reflected a situation in which industrial labour was inscribed in complex reproductive dynamics which had the rural household at its centre. The article engages with discussions about the role of global production networks in supporting the transition from agrarian to industrial capitalism in Africa. It suggests that rapid industrialisation under the impulse of global value chains leaves open an agrarian question of labour which reproduces significant dynamics of exploitation and subordination of young female workers.

Keywords: textile industry, developmental state, Tigray, labour mobilisation, household reproduction.

Introduction

In the last two decades, trends of economic growth in Africa have revitalised discussions about the potential of industrialisation to drive the structural transformation of the economy away from agriculture (for instance Busse *et al.* 2019). Mainstream views usually cast structural transformation as a linear, and to some extent teleological process whereby the dualism between agriculture and non-agricultural sectors progressively dissipate over time (for instance Timmer *et al.* 2012). However, these interpretations fail to address the complexity of labour dynamics in the context of incipient, or largely incomplete structural transformation (Bernstein 2007). This article critically scrutinises questions about labour mobilisation in the context of manufacturing development in Ethiopia putting in sharp focus the significant interdependence between the agricultural and the industrial economy. I argue that current global production networks require a critical perspective that inscribe industrialisation within complex and uneven transformation of labour which have the household at its centre. Rapid industrialisation under the impulse of global value chains leaves open an agrarian question of labour (Bernstein 2010) which reproduces significant dynamics of exploitation and subordination of young female workers seeking reproduction at the intersection between the industrial and the rural economy.

The article draws on a fieldwork conducted in and around Tigray capital city Mekelle between 2015 and 2018. A core sample of ~40 semi-structured interviews was collected with staff of industrial actors, government offices, trainees, and workers operating in the Textile and Garment sector (T&G). Additional methods included field visit of textile companies and informal discussions with civil society and advocacy organisations, and trade unions working on issues around labour and workers' rights.

In the course of the 2000s and 2010s no country in Africa epitomised expectations about rapid economic development as Ethiopia. Dubbed a clear example of "Africa rising" (Arkebe Oqubay 2015), Ethiopia experienced a yearly average growth of 10.8% between 2003–04 and 2012–13, compared with an African average of 5.3%.[1] Although this growth has been largely driven by expanding services, construction, and the agricultural sector, under the impulse of a self-declared "developmental state' the EPRDF leadership posited significant efforts in supporting manufacturing industry towards making Ethiopia a "middle-income country by 2025" (FDRE 2016). The T&G industry has been among the sectors prioritised for its potential to rip the country's comparative advantage in terms of market access, natural resource endowments, and, most importantly, low cost of labour and the availability of a large workforce seeking employment.

Under the impulse of the Growth and Transformation Plans I and II (GTP I and II), the country's strategic documents for economic development, sectoral policies were designed under the Ministry of Industry (MoI), and newly established government agencies such as the Ethiopian Investment Commission (EIC) to attract international capital. In just a few years, the T&G sector experienced a remarkable expansion. By 2014 at least thirty-six internationally funded projects were licensed for a total capital investment of over 140 million US dollars (ETIDI 2016a). The T&G compartment was thus indicated as a priority area of investment in the design of fifteen Industrial Parks (IPs) that government commissioned in the course of the 2010s with the support of international donors, particularly China. By 2016 over 130 medium and large-scale companies were operational in the segments of ginning, spinning, weaving, finishing and garment (ETIDI 2016b). The entire T&G compartment recorded a remarkable growth in the number of people employed from 72,000 in 2013 to 250,000 in 2016 (UNIDO 2017).

Tigray region has been at the forefront of this development. Mekelle Industrial Park was officially inaugurated in July 2017 and by then a number of international textile companies and brands from India, Bangladesh, and Italy, were either operational in the park or had established stand-alone factories. The textile compartment rapidly took roots in the course of the 2010s, generating expectations for a structural transformation of the regional economy towards manufacturing industry. The most apparent reason for the significant growth of textile was the low cost of labour comparing to other textile hubs, such as China, India, Pakistan, Vietnam, and Bangladesh,[2] where international brands had operated in the past decades. The availability of cheap water and electricity, two essential assets to textile operations, and preferential trade agreements with Europe and the United States were additional issues gearing momentum towards the delocalisation of international companies to Ethiopia. Reasons more specific to Tigray included the proximity to the Red Sea, and significant investments by regional and the federal governments to support textile and improve infrastructure, such as an additional railway line connecting the regional capital Mekelle to the port of Djibouti. Perception of political stability by international corporate capital was another factor. Especially after 2016, when country-wide anti-government protests gained traction, international investors regarded Tigray as the region facing lower risk of political instability and the TPLF leadership a reasonable guarantee to their investments. This is quite remarkable considering the sudden turn of events in the region in late 2020, when violent conflict between the TPLF and the federal government rapidly escalated and brought the entire country into a deep political crisis, which is uncertain and beyond the scope of this article.

In the course of the 2010s, the Ethiopian government regarded the rapid development of the textile industry as a flagship policy of the developmental state – a model that draws on the Asian way to capitalism and relies on strong state intervention and selective liberalisation of the economy (Clapham 2017). Manufacturing was expected to promote a structural transformation of the economy away from agriculture and towards sustaining high rates of economic growth by uncapping export market opportunities (FDRE 2016).

To attract international capital the Ethiopian government took a number of investor-friendly measures, including tax breaks and controlled devaluation of the currency. In the long run international investment was expected to create domestic capacity through technical and technological spill-over, and the progressive consolidation of Ethiopian textile firms that compete on the regional and global scene (Arkebe Oqubay 2015). More immediately, by the mid-2010s the development of the textile industry in Tigray intersected existing trends of urbanisation and transformation of labour from agriculture to manufacturing. From the perspective of textile corporations one specific challenge was how to capitalise the comparative advantage of cheap labour into a competitive advantage for the industry, considering that productivity of the average worker was significantly lower than in other Asian textile hubs. The Ethiopian government regarded the textile sector as a potential important source of job creation: since the 2000s youth unemployment was considered as a significant threat to political stability which the rise of manufacturing was expected to attend. The transition from agriculture to manufacturing would represent not only a radical recalibration of the regional economy, but also a major departure from a rural way of life in cultural and social terms. These set of transformations, and the tensions they came with, are the empirical object of this article.

This article reconstructs the recent history of manufacturing industry in Tigray, addressing key moments of continuity and rupture in the way the TPLF leadership attended the historical question of labour, i.e., how to diversify employment out of smallholder agriculture. By the time it took power in the course of the 1980s, the TPLF understood the labour question in terms of how creating job opportunities out of agriculture through the structural transformation of the regional economy (Young 1997a). I argue that the rapid consolidation of manufacturing industry in Tigray in the course of the 2010s generated an important shift. The new question was about how sourcing industrial poles with workers that were now dispersed across the countryside, with the prospect of initial salaries below basic costs of reproduction. This generated two main effects. First, the coexistence of labour shortage in the newly established industrial poles and a large population seeking employment. Second, the textile industry of Tigray generated a new agrarian question of labour inscribing young female workers in complex reproductive dynamics which had the rural household at its centre.

Although the recent conflict in Tigray is likely to have a significant impact in the way these dynamics will unfold in the future, this-case study shows that the agrarian question of labour remains a key tension of the Ethiopian industrialisation policy under the developmental state. This casts a shadow on the developmentalist scope of industrial policy in Ethiopia, urging a more careful analysis of the much more complex relation between structural transformation and labour dynamics in the context of the transition from a predominantly agricultural to an industrial economy.

Global production networks and the agrarian question of labour: a household perspective

Recent years have seen a growing body of literature addressing the impact of global value chains on labour-intensive industries in the global South. As an increasing proportion of global trade is today channelled through vertically integrated value chains dominated by transnational firms, this has prompted the expansion of agro-industries, manufacturing, and services in new markets. Ensuing global and regional production networks are characterised by significant opportunities for the firms involved, including higher value production and diversification of supply chains, but also challenges, such as meeting the quality standards and commercial demands required by international buyers. Global Value Chains (GVC) analysis has focused on questions around the governance of these value chains – for instance a focus on value creation, differentiation, and capture in production and distribution processes (Bair 2009). Parallelly, a growing strand of studies, known as Global Production Networks (GPN) theory, has focused on the social aspects of increasingly connected commercial operations, particularly mapping the wide range of stakeholders across the value chain that prompt global production (Gereffi 2006; Gereffi, Kaplinsky 2001). Critical studies addressing the impact of GPN in the global south have thus emphasised questions around power relations between the actors dispersed across the value chain, and particularly a focus on work and labour relations (Reinecke *et al.* 2018; Barrientos *et al.* 2011; Dunaway 2014).

This article engages with GVC/GPN literature from two perspectives. First, I put into sharp focus how global and regional production networks intersect discussions around the "agrarian question of labour' in the global South. Following Henry Bernstein (2007, 2010), current waves of industrialisation in the global South are characterised by very different dynamics than earlier transitions in the global North because they leave open an "agrarian question of labour', which is about the inability of armies of labour to reproduce themselves under current configurations of global capitalism. A focus on the agrarian question of labour is meant to problematise the ways in which we scope the impact of global production networks to support the transition to industrial capitalism and, crucially in the case of Ethiopia, the role of the state in mediating such process. In particular, the condition of young female workers entering the textile industry in Tigray can be productively discussed with what Bernstein has defined "classes of labour' (2010: 110), which describes the pursuit of livelihoods through complex combinations of scarce and poorly remunerated wage employment, self-employment, and other survival activities in the domain of the "informal economy". For Bernstein these working poor are entrenched within capitalist relations to the extent that their reproduction depends fully, directly and indirectly, on the sale of their labour power. In fact, they inhabit a social world of "relentless micro-capitalism" (Davis 2006: 181). Their reproduction reflects a condition "of growing income insecurity and "pauperization' as well as employment insecurity and the downward pressures exerted by the neoliberal erosion of social provision for those in "standard' wage employment" (Bernstein 2010: 111).

Second, in order to situate the agrarian question of labour within GVN/GPN I take household reproduction as a central unit of analysis. As noted by Elena Baglioni (2021), the household's key role in social reproduction remains a largely unexplored theme in GVN/GPN theory. Household relations are usually an overlooked aspect of the labour process in global production networks, as these are usually regarded as not pertaining to the production process and relegated to the private sphere. However, as demonstrated by Bridget O'Laughlin (2013), households usually play an important role in filling the gap of hampered transitions in which workers remain unable to make a living through wage labour. Discussing the case of horticulture in Senegal through a class relational approach, Elena Baglioni (2021) adds that global production networks systematically externalising the cost of reproduction to the workers reflect specific gender dynamics: the inherent conflict between production and reproduction at the bottom of the value chain results in the further fragmentation of women in classes of labour. This is thus in line with studies within the field of feminist political economy showing that the externalisation of the cost of reproduction to gendered and racialised workers is a key component of surplus value extraction and capital accumulation (Dunaway 2014; Mezzadri 2016).

The case of Tigray analysed here shows that the household not only plays an important role in the reproduction of young female workers, but also that the viability of the textile industry in the period under review relied heavily on the household via the subsidisation of industrial wages below the cost of reproduction. This has two important implications. First, global production networks must be inscribed within broader dynamics at the intersection between the rural and the urban economy, beyond a view of the transition to industry as a linear process whereby wage employment substitutes agriculture. This reflects new labour regimes emerging along complex strategies of diversification in which the household remains a central unit of analysis to understand the aspirational and material scope of the transition to industrialisation. Second, in Tigray, industrialisation efforts relied substantially on cheap female labour mobilisation. Young female workers employed in the garment sector embodies the tension between the productive rationale of global capital and the reproductive logic of the household (Fraser 2016). This reflects labour regimes emerging along the complex interplay between dynamics of labour exploitation and discipling (Baglioni 2018). Lacking claims to land and vesting a subordinate position within the household, young female worker become a disposable pool of industrial labour, the ideal workers to be exploited below their cost of reproduction. As result, far from providing opportunities for social and economic enfranchisement, the exploitative logic of global production networks further reinforces gendered dynamics of subordination within the household. It is precisely against the multiple strategies through which female workers struggle to reproduce themselves at the intersection between the industrial and household economies that one must read the challenges confronting the transition to industrial life under the textile industry in Tigray.

The historical question of labour in Tigray and the rise of manufacturing

The policy emphasis on industrialisation to sustain the structural transformation of the economy away from agriculture in Tigray is deeply entrenched in the political history of the TPLF political leadership. Particularly, it can be traced back to the late 1980s, when the TPLF progressively consolidated power playing a leading role in the coalition of ethno-nationalist movements which eventually overthrew the Derg regime in 1991. Despite political transition came with a commitment to a capitalist economy, the TPLF leadership was deeply imbued with a Marxist-Leninist ideology understanding the revolution in terms of class struggle and regarding the business community with profound suspicion (Medhane Tadesse, Young 2003). At the same time the transition had emphasised the contradictions of a regional economy relying on peasant agriculture and characterised by a steadily growing, and land hungry population. Although land redistribution was a key mechanism the TPLF adopted to consolidate its authority during the liberation war against the Derg, further redistribution had already been ruled out in the late 1980s for fear that plots would rapidly become too small to be economically viable (Young 1997b). This became a source of tension for a growing number of young landless peasants in the aftermath of liberation.

The political transition came with significant expectation for economic alternatives. However, the way ahead was not straightforward. Departing from a system of state ownership of land was out of question for fear of land accumulation among few wealthy and "rent seeking' commercial farmers (Paulos Milkias 2001). This configured the contour of the historical question of labour: with the rural economy overtaxed by a growing population and few potential avenues for diversification, the TPLF leadership was demanded to seek new avenues in the urban economy, despite its traditional aversion for the private sector and suspicion for middle class development. It is with this in mind that the TPLF leadership started regarding industrialisation as the solution to provide stable employment for the region's growing and land-starved population (Young 1997a: 85).

Nonetheless, the long liberation war and the post-socialist transition from a planned to a market economy generated a number of additional problems. First, although the service sector in the early 1990s was making some significant progress, the few and cautious private investors regarded agro-industrial development as a risky enterprise, requiring significant capital inputs which were not readily available anyway. Second, federal state investments in industrial development were regarded with profound scepticism after the unsuccessful experience of 17 years of planned economy under the Derg. Although the TPLF now played a prominent role in federal government, in the years immediately after the transition a sense of economic self-administration was still prevalent in a majority of the TPLF political leadership (Young 1997a). This was accompanied by a generalised sentiment regarding a largely Amhara-dominated central bureaucracy as an obstacle, or even a threat, to Tigray national interest. Third, peasant farmers in Tigray could only produce minimal savings and the countryside was unable to create the capital accumulation required to sustain rapid industrialisation. For all these reasons a consensus emerged in the TPLF central committee to follow a different model, relying on the private sector but under tight control of the party leadership. This resulted in the creation of a community-based organisation, the Endowment Fund for the Rehabilitation of Tigray (EFFORT). EFFORT, a parastatal entity, was meant to support industrial development, producing profits for further growth, and sustain war veterans and their families.

As noted by Young (1997a: 85), EFFORT started operating in Tigray in 1995 with a significant amount of capital drawn from equipment captured from the Derg, companies and funds mobilised by the TPLF, and contributions from non-governmental organisations, private companies, and financial institutions. Expression of the TPLF central committee, with seven of its members initially appointed as managers, EFFORT was premised by an understanding of the failure of many state-owned companies as residing in their complete alienation from market logics and demands. Because of this EFFORT was designed as a constellation of private enterprises, responding to market rationality, whose priorities had the socio-economic transformation of Tigray at their best interest. The logic underpinning EFFORT was not dissimilar from the approach to economic transformation that the country later on embarked under the developmental state. In fact, EFFORT can be regarded as a microcosm of the developmental state's approach to the relationship between the state/party structure and the private sector.

By the time of fieldwork EFFORT controlled a number of companies operating across the country, including in the field of construction, shipping services, transportation services, pharmaceutical products, commercial farming, and tourism. As far as specific plans for Tigray were concerned, soon after its creation EFFORT started investing in several projects, establishing a number of corporations which then became leader in their respective sub-sector in Ethiopia. Most importantly to our discussion EFFORT established a textile and garment factory in Adwa called Almeda Textile PLC, which became operational in 2000. Young (1997a: 88) contends that the initial decision to locate the textile industry in Adwa was at least partly motivated by the fact that a large population in the area suffered land shortage. Developing the textile sector was expected to reduce the traditional migration of peasant farmers to Eritrea, Addis Ababa, and southern Ethiopia in search of seasonal and permanent work.

In two decades, the EFFORT galaxy expanded steadily across the country benefiting from a flexible approach to business, a dynamic management, and foremost by significant government support. Critics emphasise how the rapid growth of EFFORT was largely due to the next-to-monopoly economic position which the conglomerate enjoyed alongside few other corporations (Vaughan, Mesfin Gebremichael 2011). One example is MAA Garment and Textiles, a fully integrated textile factory established in 2004 at Qwiha, a locality in close proximity to Mekelle airport where in the course of the 2010s other international textile investments established their plants. MAA garment, controlled by the Kebire Enterprises PLC, is a company owned by the Saudi/Ethiopian billionaire Sheik Mohammed Hussein Al Amoudi. Like EFFORT, Al Amoudi benefited from its privileged position within the political leadership to build a vast cluster of companies operating across Ethiopia, which for instance include MIDROC and the Sheraton Hotel in Addis Ababa.[3] Other private sector companies not connected to the political leadership faced significant difficulties. Challenges included access to foreign currency, internet and communication services, loans and other forms of credit (Sutton, Kellow 2010; Vaughan, Mesfin Gebremichael 2011). Arguably, until the 2010s, the EPRDF/TPLF control of the economy hindered the growth of industry and services significantly. Lack of transparency and genuine competition between companies reduced the ability of private actors to get government contracts assigned, contributing to create a difficult business climate for potential domestic and foreign investors. Sutton and Kellow (2010) argue that lack of competition generated significant inefficiency and disfunction in service delivery and provision, because the ability of private companies to stay on the market was determined by the extent to which they enjoyed state/party support.

This context of relative adverse conditions to private investments changed suddenly in the course of the 2010s when, under the impulse of the developmental state, the Ethiopian government opened the doors to foreign investors. Manufacturing industry was one of seven sectors prioritised by Ethiopia under the accelerated strategy for economic transformation elaborated in the strategic plans GTP I (2010-2015) and GTP II (2015-2020). GTP II set the ambitious objective "to make Ethiopia a leading manufacturing hub in Africa and among the leading countries in the globe" (FDRE 2016: 136). Manufacturing was expected to drive an annual growth in jobs created by 15%, from 380,000 in 2014/15 to 758,000 by 2019/20 at the end of the plan (FDRE 2016: 95). In the mind of the EPRDF/TPLF political leadership economic and political objectives were mutually reinforcing. Under the developmental state paradigm manufacturing was thus entrenched on a high modernist view of the country's future as lying on industrialisation and large-scale infrastructural projects (Mosley, Watson 2016). Wage labour opportunities in manufacturing was expected to sustain economic growth. Structural transformation was as much about economic development, as it was about the political project of the developmental state, expected to drive the transition of millions of rural smallholders to urban, wage-based, lifestyle.

Support to manufacturing relied on a theory of import-substitution in the context of the progressive consolidation and diversification of domestic industrialisation efforts (Arkebe Oqubay 2015). This strategy, known as Top-Down Pulling Strategy, was elaborated already in the course of the 2000s in the circles of the MOI, and with the significant support of UNIDO, and then streamlined in GTP I and II (ETGAMA 2014). This strategy, which was expression of the vision behind the developmental state, was based on an approach to economic transformation casting a central role to strong state intervention to sustain industrialisation (Mekonnen Manyazewal, Admasu Shiferaw 2019). From a macro-economic perspective, the strategy focused first on developing more labour-intensive segments of the value chain to allow industry to take root through foreign investments, attracted by the low cost of labour and favourable fiscal environment.

Tigray, and Mekelle in particular, was indicated as a priority area for the development of T&G. By the mid-2010s government signed a contract with the China Civil Engineering Construction Corporation (CCECC) to build the Mekelle Industrial Park some 5 km west of downtown. IPs drew on an economic model based on the principle of industrial clusters (Ceglie, Dini 1999). For late industrialisers like Ethiopia IPs were meant as aggregators and accelerators of industrial development by facilitating the clustering of individual enterprises that share infrastructure, minimise costs of utilities, and gain access to nearby skilled labour markets, educational facilities, research, and other critical inputs (Arkebe Oqubay 2015). Mekelle IP was officially inaugurated on 9 July 2017, and companies started production lines since January 2018. Rents for shed space was very attractive to investors. For the first four years rent was 2 US dollars per square metre/month, 2.5 dollars for the subsequent three years, 2.75 dollars on years eight to ten, and up to 3 dollars for the following five years. In 2018 Mekelle IP extended over 75 ha of land and was constituted by twelve sheds occupied for a vast majority by three international corporations: Strathmore Apparel manufacturing PLC, KPR Exports PLC, and SCM Garment Knit textile PLC.

Further to the development of the Mekelle IP a number of other international companies had established stand-alone, vertically integrated factories in the area of Mekelle since the mid-2010s. The first of these ventures was Velocity, a subsidiary of Dubai-based Vogue International Agency, which launched production lines as early as in 2016. The Italian Calzedonia Group, a global apparel manufacturer and retailer, created the subsidiary company ITACA Textile PLC in 2016, and completed the construction of its standalone factory in October 2018 at Ashegoda, near Mekelle city. Although data are not accurate, following the Bureau of Trade, Industry and Urban Development in Mekelle,[4] by 2018 over 10,000 micro and small enterprises in the field of weaving and garment were operational in Tigray. While officials also contended the sector was rapidly growing, a majority of these enterprises were individual or family undercapitalised businesses, often operating the traditional Ethiopian handloom. By the late 2010s the textile sector in Tigray was characterised by a significant disjunction between highly capitalised, large-scale, and fully integrated factories producing for export, and a magma of micro-businesses at the intersection between the formal and informal economy. Supporters of government industrial policy argue that the growth of large-scale operations was expected to drive, in the medium run, the creation of new business opportunities for domestic companies in sectors such as accessories and complementary production activities (Arkebe Oqubay 2015). Critics of this model warned that vertically integrated factories were unlikely to generate know-how and technology spill-overs in the local and national economy (Whitfield *et al.* 2015). They rather pointed at the significant environmental and social costs of the textile industry and the negative externalities of global corporate investments as a significant configuration of contemporary financial capitalism.

While the conflict that erupted in Tigray since November 2020 cast a shadow to the future of the textile industry in the region, its rapid expansion under the impulse of foreign investments had radically changed, in the course of the 2010s, the question of labour as it was initially understood by the TPLF leadership in the late 1980s. Rapid industrialisation had finally come, generating a significant demand for labour. While by the time of fieldwork fluxes of people were still limited due to the fact that main industrial actors were still to produce at full capacity, industrial actors already lamented shortage of skilled labour as a main constraint to the rapid consolidation of operations. Demand for labour was expected to rise sharply in the next years. The new question of labour was then no longer about how creating job opportunities out of agriculture. It rather was about how sourcing industrial poles with workers that were now dispersed across the countryside. This call into question the intersection between the new industrial economy and agriculture, the topic of the next section discussing the experience of workers and prospective workers in the textile sector around Mekelle.

The new agrarian question of labour under accelerated industrialisation

As noted by Oya (2019: 670), "the process of building an industrial working class is uneven, protracted, and requires interventions and a range of important economic and social shifts over a sustained period". This captures well the transformation that the area around Mekelle was facing in the course of the 2010s under the impulse of accelerated industrialisation. A large potential workforce to be employed in industry was available across the region in the form of unemployed youth and landless (or land short) smallholders seeking alternative to agriculture. By June 2018 urban unemployment in Tigray was reported at 21.5%, with significant disparities between men (17.1%), and women (25.5%), and in a trend of growth, although marginal, since 2012 (CSA 2018). A similar gender gap was reported in urban employment in the informal sector (18.9%), significantly more prevalent among women (26.0%) than men (12.3%) (CSA 2018). According to several local officials interviewed, signs of significant labour movement to industrial poles from the neighbouring localities in the countryside were thus already evident since 2017. These included from the *wereda* of Degua Temben, Hintallo Wajirat, Enderta, Saharti Samre, Wukro Town, and Kilte Aewlallo. The textile industry was thus attracting workers with a specific profile: young women employed as basic operators constituted over 85% of the workforce engaged by large textile corporations. In informal discussions, managers of these companies were quite open to admit that women constituted a more easily controllable pool of labour than men. Young women were regarded as more "adaptable' to sustain long shifts and repetitive tasks required by industrial sewing operations, as well as less prone to voice complaints.

By the time of fieldwork sustained industrialisation was constrained by shortage of labour. Manufacturer struggled to recruit the skilled manpower they required to run assembly lines and rates of absenteeism and turnover were alarmingly high. In the following pages I will illustrate two interrelated dimensions of the new labour question as emerged in a thematic analysis conducted through qualitative fieldwork in the area of Mekelle in the course of 2017 and 2018. These are the level of wages below reproduction, and the intersection between wage labour and household reproduction. I argue that these two issues reflected key tensions in the political project of rapid transformation to industrialisation under the Ethiopian developmental state.

Wages below reproduction

One of the most important factors explaining why Ethiopia in the course of the 2010s quickly became a recipient of international investments in the T&G sector was the availability of cheap labour. The T&G is among the most labour-intensive sectors in manufacturing requiring a large number of unskilled workers to be employed as basic operators (CSA 2015). By the time of fieldwork, entry-levels textile wages remained significantly lower than in other leading manufacturing countries. Barrett and Baumann-Pauly (2019: 9) found that textile entry salaries in the Hawassa IP were as low as 26 dollars/month, significantly lower than other textile manufacturing countries such as Bangladesh (95 dollars/month), Laos (128 dollars/month), Vietnam (180 dollars/month), China (326 dollars/month), and Turkey (340 dollars/month), and of other competitors in Africa such as Kenya (207 dollars/month) and South Africa (244 dollars/month). The same study explains that low salaries result from at least two factors: the lack of minimum wage legislation, and the fact that, as a result, the industry set the entry salary at the same level of the one typically paid to entry-level Ethiopian public employees (Barrett, Baumann-Pauly 2019: 12). The gender distribution of employment in the textile industry varied significantly depending on the size of companies. In Tigray, men dominated micro and small businesses whereas basic operators in large industries were largely women.

Low entry salary was mentioned in all interviews as the main concern of workers and prospective workers in the textile industry. Wages could be as low as 800 Ethiopian birr/month (less than 1 dollar/day) for basic operators, although with the prospect of marginal increases over time. Employers contended that salaries complied with Ethiopian law, and low entry levels were motivated by the lack of skills and low labour productivity. In a context in which the cost of living in peri-urban Mekelle was rising sharply, interviewees lamented that wages were usually not even sufficient to cover immediate necessities. Industrial employment did not allow young employees to meet basic reproduction, from an economic perspective, but also from a social one. This had two important consequences. First, workers regarded industrial employment as a short-term strategy, and second, they remained dependent on their family/kin network for meeting basic economic reproduction. The following stories serve to illustrate these points.[5]

S.G.[6] is a young woman aged twenty-two who has worked as sewing operator for eight months in one large textile factory near Mekelle. Her monthly salary was approximately 800 birr/month and, in addition to it, she explained she was entitled to lunch at the factory canteen and use the health clinic. She relocated from her hometown, three hours away by bus from Mekelle, making daily commute impossible. For this reason, she rented a room closer to the factory together with two other friends originating from the same town. S.G. explained that with what was left after contributing 300 birr towards the accommodation rent, she was barely able to buy food. She contended that industrial employment was only a temporary step towards something else. "I want to acquire skills and experience to find a better job, hopefully closer to my family [...] this is my first work experience in factory [...] initially I was very excited, but then I realised that work is hard and with the money I make you can't do much".

Not much different was the perspective of G.F.,[7] a 19-year-old woman, living in Qwiha, a suburban area next to Mekelle airport hosting three large-scale textile manufacturers. G.F. earned a salary of 800 birr and was still living in her family house together with her three sisters and her mother. She explained that her salary, although was an important contribution towards family income, was remarkably low considering the tight schedule of factory life, even when compared to other activities in the informal sector. "When you run your own small business, no matter how small, you can do many different things while working [...] Working at the factory is hard to get time off even to go to Church or attend a funeral [...] Salary can increase after some time, but does this justify living in isolation every day for most of the day?". By isolation she meant that industrial employment limited her possibilities for cultural and social reproduction – isolation from her family, her network of kin, and her community – but also economic reproduction – inability to perform multiple activities at the same time. For people like G.F. industrial employment did not allow any form of saving, nor constituted an effective risk diversification strategy. G.F. perspective points at broader social and cultural challenges coming with the transition to industrial life: she regarded industrial employment as a short-term strategy that she pursued waiting to find better alternatives. She also explained that very rarely basic operators had a long-term perspective on industrial employment.

While industrial manufacturer required at least Grade 10 education as basic entry criteria, many young workers had completed full secondary education (Grade 12). Absence of significant job opportunities led many recently graduated students to opt for industrial jobs whilst they were waiting for better alternatives. For instance, this was the case of Z.D.[8] a young woman from Mekelle, coming from a relatively wealthy, and urbanised, family. "Completing basic education is today not enough to secure a job [...] I decided to work as textile operator even though salary is very low [...] this is a temporary solution, the good thing about factory work is that shifts end early [...]. I enrolled at the evening class to pursue my diploma degree". Like in the case of Z.D. many recently graduated students took the opportunity to work in industry as a way to further their study. Workers enrolled in private colleges in Mekelle are offered evening classes for diploma and certificate. Z.D. contended that her salary was barely enough to cover the cost of her degree and had to rely on the support of her family for sustenance. She also explained that as work shifts were very heavy, studying and following class proved very hard, and she was wondering whether all that was worth for the little salary she earned. Industrial employment was regarded as a short-term strategy even by urbanised and relatively more educated young workers, although, the case of Z.D. shows that people tried to make the most of it in a context of limited opportunities.

Salaries were thus eroded by a spiking cost of living in the course of the 2010s. Several years of rapid GDP growth had generated a significant increase in import, putting pressure on the national balance of payments. To counter these pressures the Ethiopian government enacted several devaluations of the Ethiopian birr, which reduced even further the real purchase power of cash based industrial salaries. One of such devaluation was enacted by Ethiopia's Central Bank in 2017 at the time of my fieldwork in Tigray. In this occasion the Central Bank devalued the Ethiopian currency by 15% on 10 October in an evident effort by government to boost lagging exports. This was clearly welcomed by international industrial manufacturers, who saw labour costs dropping by 15% overnight. Conversely, the decision frustrated industrial workers who saw their already limited purchase power dropping even further. The devaluation was mentioned in interviews as yet another reason solidifying the view of industrial employment as a livelihood strategy with limited prospects. As the real purchase power of cash-based employment dropped, non-cash jobs, including agriculture and individual businesses, became more attractive because they allowed people safer risk diversification strategies. Many young women who approached the textile industry with expectations, and usually motivated by the lack of alternatives, soon after realised that factory work was much harder than initially anticipated and immediately sought alternatives.

The main takeaway point of this section is that people continued to seek employment in the textile industry despite wages below the cost of reproduction. None of the interviewees regarded work in the textile industry as a long-term strategy, nor expressed the will to settle in the industry permanently. It seems that lack of alternatives was the main reason motivating many people to accept industrial jobs in the short run. Nonetheless, this did not mean that people disregarded the importance of industrialisation to their future and for the future of Tigray and Ethiopia. Like for those students using industrial employment to pursue additional education, people tried to make the most of the limited opportunities that industrialisation offered to them. Working in the textile sector was precisely seen as an investment in the future, one that entailed sacrificing immediate needs. Many young people thus saw this as a necessary step to approach adult life and making a better living later on. This had one crucial implication to the broader industrialisation strategy: young workers remained dependent in different capacities to other activities for meeting their reproduction. To capture the salience of labour regimes confronting young women at the bottom of the textile value chain, one has to take a broader household perspective.

The intersection between the industrial and the agricultural economy

Industrialisation in Tigray generated significant expectations in a context of limited opportunities. Young people attached to it individual and collective aspirations, including the search for economic independence, as well as social and cultural enfranchisement. Nonetheless, salaries below the cost of reproduction made it impossible for young workers to live an economically independent life. Young workers continued to depend for their sustenance on their household of provenance and other support, shaping new networks and relations of people and resources in the context of rapid industrialisation. A recurrent theme emerging in interviews is that employment in the textile industry paying minimum wages did not make much sense from the perspective of individual economic reproduction. Nonetheless, industrial employment took on material and symbolic value when regarded from the broader perspective of a household reproductive strategy.

This is particularly important for those workers coming from households with an agricultural background. For instance, this emerged in the story of K.L.,[9] a 22-year-old woman who had worked in one textile factory near Mekelle for the past nine months. K.L.'s father is a smallholder farmer and before finding job as textile operator she spent her life helping with the farm, while attending school up to grade 8. "Working as textile operator is important because it gives my family a cash salary, and allows us not to rely on agriculture only [...] sometimes you need cash to pay for things in advance, like seeds and fertilisers, and you have to get indebted if you don't have cash at the right time of the year".

The story of K.L. is an entry point to a more nuanced perspective on the meaning and value of industrial employment, and the small salaries coming with it. Like other young workers her salary would not be enough to cover her basic sustenance, and yet it played an important role from the broader perspective of her household reproductive strategy. K.L. explained that to avoid paying a rent she found hospitality at some relatives' who live in the factory's surroundings. In exchange she performed a number of different tasks after work, including cleaning, preparing food, and babysitting. In this way she entered a new relation of exchange with her household in the countryside. She sent money back to her father when he was cash-short to purchase fertilisers and making some other investments in the land, and then received back later on some money after the harvest when agricultural produce could be sold in the market. K.L.'s cash income was an important component of the predominantly non-wage, and agriculture-based sustenance strategy of her household. This also shows how, in a context of uncertainty and rapid transformation, people valued the diversification of income sources as a risk aversion strategy. K.L. concluded her interview contending that, despite mutual exchange, ultimately without the support of her family and network of kin, working as a textile operator would have been unsustainable.

In a similar way B.G.,[10] a woman in her early twenties, explained that while depending significantly on her family assistance while employed as a textile worker, her hope was that such effort was going to eventually pay off in the future. "My father [a farmer] encouraged me to find employment as textile operator, he said it was an investment in the future [...] he wanted me to learn and open a business so that all our family could benefit. [...] Reality is very different, I am not sure I will ever make enough money to send back to my family".

The story of B.G. is again illustrative of the extent to which industrial employment takes on an important value when regarded as part of broader household planning – particularly an investment in the future. However, it also shows that young women with wages below reproduction are often subsidised by their household of provenance. This points at an apparent paradox, that is, industrialisation policy in the course of the 2010s, while it was intended to generate the structural transformation of the economy away from agriculture, it relied on rural accumulation to make up for wages below reproduction. This has precedents in the literature. Evidence from Bangladesh (Kibria 1998) shows that migrant workers employed in the garment sector remained dependent on their rural households supplementing their low factory wages with resources such as rice. In a seminal article, Wolpe (1972) has argued that in the case of apartheid South Africa the wages of rural out migrant were subsidised by the non-wage activities of the household in the *bantustans.* As result, the rural areas performed a social security function providing welfare for young workers which were living at the intersection of urban and rural life.

Some of these issues clearly resonate the case of the textile industry of Tigray. To illustrate this point further we can look at risk diversification from the perspective of the broader transformation that transition to industrial life entails. Experiences of women seeking employment in the textile industry of Tigray were seldom the result of individual decisions. Rather, they were often part of broader household reproductive strategies to diversify risk and to make the most of limited opportunities coming alongside industrialisation. This was partly due to the gender profile of the industry, which largely privileged employing young women,[11] but also to a context of increasing land pressure in agriculture and limited opportunities for young people to meet reproduction through farming. Industrial employment opened up opportunities for young women, who usually held weaker claims to land than men, to become an important asset for the household's income diversification.[12] Young women taking industrial employment, no matter how low the salary, allowed a household to maintain a claim to the land via the men working it, while generating an additional source of cash and, most importantly, keeping open opportunities that in the future could arise from industrialisation and increased urban-rural interactions. It is in this way that young women employed at the bottom of the textile value chain were part of broader reproductive strategies which had the household at their centre.

For instance, this was the case of F.R.,[13] a 23 years old woman coming from an agricultural background and who had been employed in one textile factory for the past fifteen months. She explained that for generations her family relied on farming as the primary source of sustenance, although in a context of increasing land shortage. She explained that by the time we meet, her father had 0.75 ha scattered across three different plots, which he was farming, alongside some other land leased from neighbours, together with her three brothers. F.R. explained that her household relied on a combination of production for direct consumption and for the market. It is against this context, she explained, that availability of cash was important to allow investments in advance to the agricultural season, as well as the ability to retain important assets such as oxen. "Working as a textile operator is very challenging [...]. I hope things will change in the future, but right now I have no alternative [...]. Cash income is important because to grow food you need cash in advance if you don't want to get indebted".

A crucial aspect of the transition to industrial life in the course of the 2010s in Tigray was the fluctuation of agriculture commodity prices in different times of the year. Like in the case of F.R., many agricultural households relied on a combination of agricultural production for internal consumption and for the market. Normally, households were relatively wealthy when they were able to store and sell high value cash crops, such as *teff*, at the right time and were able to avoid distress sales when prices were low, particularly right after harvest. The important point emerging from interviews is that, in this context of significant fluctuation of agricultural produce prices, industrial wages had an important value symbolically – pursuing future alternatives – and materially – as a coping strategy to meet immediate needs. As households were normally large, and farming dominated by men, wages earned by women, no matter how little, were regarded as an opportunity to facilitate capitalisation in a context of partial and incomplete transition to a cash-based economy. By forcing young workers to seek reproduction both through wage labour and through their broader kin network, industrialisation rarely constituted a pathway to socio-economic enfranchisement: more often it reproduced

existing dynamics of subordination of women within the household. A focus on the household illustrates a broader agrarian question of labour that global production networks leave open, one that compels young female workers to reproduce themselves through their labour but without extinguishing their subordinated role completely.
The rapid expansion of the textile industry in Tigray was therefore inscribed in a number of socio-economic interactions, flows of resources, and migratory processes reflecting the complexity of the transition from agrarian to industrial capitalism. As young women could not become entirely independent through industrial employment, these patterns were never unidirectional from rural areas to industrial poles, but they were rather inscribed in multiple movements of people and resources back and forth to their place of origin.

Conclusion

Perhaps the most evident expression of the tensions entrenched in the relation between industrialisation and labour mobilisation outlined in this article is that, by the time of fieldwork, all the textile companies surveyed in Tigray were experiencing alarmingly high rates of labour turnover, absenteeism, and tardiness. While a comprehensive discussion of these issues is beyond the scope of this article, at the time of this writing the eruption of violent conflict in Tigray since November 2020 had already radically impacted the overall framework and prospects of the textile industry in the region. News reports documenting the destruction of EFFORT controlled companies, including Almeda Textile in Adwa,[14] and, more broadly, the disruption that came with a violent conflict between the TPLF and the federal government led by Prime Minister Abiy Ahmed, in office since April 2018, are likely to have long lasting impact on the future of Tigray. As far as the scope of this article is concerned, the Tigray conflict is likely to have affected those labour dynamics and tensions that were evident during fieldwork up to 2018, marking in this a potential new discontinuity in the relation between structural transformation and labour mobilisation in Tigray.
While the future remains uncertain, in this article I have shown that the model of rapid industrialisation embarked on by Ethiopia in the course of the 2010s has been rich in tensions and contradictions. This article has pointed out the centrality of the labour question in the ways in which the scope of the policies promoted under the developmental state have had practical implications to the life of young people seeking employment in their pursuit for a better future. Future research will have to put in sharp focus the mutual imbrication of rural-urban interactions in the context of industrialisation efforts. That early industrialisation relies on rural capital accumulation to subsidise industrial wages below the cost of reproduction is not a novelty in itself but is one that needs to be acknowledged and taken into account at the level of the design and implementation of policies and reforms for the future of Tigray and of Ethiopia.

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NOTES:

1 - *Ethiopia Overview*, "World Bank", 2015: http://www.worldbank.org/en/country/ethiopia/overview, retrieved on 4 November 2019.

2 - At the time of fieldwork an Ethiopian basic textile operator's salary averaged one fifth of China's and half of Vietnam's. For a critical approach see also the report by the Worker Rights Consortium (WRC 2018).

3 - For more information about MIDROC see http://www.midroc-ceo.com/.

4 - Interview conducted on 18 January 2018.

5 - Names of interviewees are not disclosed here to protect their identity.

6 - Interview with a textile worker (female, 22 yrs.) in the area of Mekelle, September 2017.

7 - Interview with a textile worker (female, 19 yrs.) in the area of Mekelle, December 2017.

8 - Interview with a textile worker (female, 23 yrs.) in the area of Mekelle, February 2018.

9 - Interview with a textile worker (female, 22 yrs.) in the area of Mekelle, October 2017.

10 - Interview with a trainee (female, 21 yrs.) in the area of Mekelle, September 2017.

11 - Available figures show that 85% of employees in textile are women aged 18-25 with a low socio-economic profile.

12 - In Ethiopia, all land is formally state property, and households retain limited tenure in the form of usufruct rights for the purpose of sustaining a livelihood. Despite a programme of rural land registration, implemented in Tigray region in the late 1990s, aimed at reducing gender-based imbalances, several studies show that access to land remains characterised by significant disparities between men and women (Dokken 2015, Adal Yigremew 2006, Bereket Kebede 2008).

13 - Interview with a textile worker (female, 23 yrs.) in the area of Mekelle, January 2018.

14 - *Tigray: The looting of the Almeda textile factory in Adwa*, «Eritrea Hub», 26 December 2020.

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