

# Ethiopia's Blue Economy: A Strategic Workforce Analysis and Opportunity Roadmap

## Executive Summary

Ethiopia, a nation endowed with extensive freshwater resources, stands at a pivotal moment in its economic development. The government's formal adoption of the **National Blue Economy Strategy (2023-2027)** and the **Ten-Year Fishery and Aquaculture Master Plan (2024-2034)** signals a clear ambition to transform its lakes, rivers, and wetlands into engines of sustainable growth, job creation, and improved livelihoods. This report provides a systematic nationwide examination of the employment landscape across Ethiopia's Blue Economy, mapping occupational categories, analyzing workforce dynamics, and delivering a strategic roadmap for human capital development.

The analysis reveals a **"dual workforce" structure** within the Blue Economy. On one hand, the capital-intensive hydropower sector provides a pathway for formal, high-skill employment for engineers and technicians with structured careers and competitive salaries. On the other hand, the traditional fisheries and emerging tourism sectors are dominated by a vast informal workforce characterized by low skills, precarious employment, and highly variable income. This duality necessitates a bifurcated workforce development strategy that simultaneously strengthens advanced university programs and builds robust vocational training systems to formalize and upgrade the skills of the larger informal labor pool.

The most significant opportunity for mass employment creation lies in the **aquaculture sub-sector**. With a production potential of 402,000 tons annually against a current output of just over 1,000 tons, the sector's growth is severely constrained by critical input shortages, particularly in locally produced, high-quality fish feed and fingerlings. This presents a clear opportunity for investment in value-chain activities that can generate thousands of semi-skilled and technical jobs.

However, the entire Blue Economy workforce pipeline suffers from a critical **"missing middle."** While universities produce high-level scientists and engineers, there is a profound deficit in accredited Technical and Vocational Education and Training

(TVET) programs for mid-level technicians. This shortage of skilled **aquaculture technicians, hatchery managers, boat mechanics, and fish processing specialists** is a primary bottleneck to sector-wide growth and modernization.

Furthermore, the report identifies the indispensable role of **Non-Governmental Organizations (NGOs) and Community-Based Organizations (CBOs)**, which function as the primary employers and capacity builders in rural, community-focused sub-sectors like conservation and fisheries management. Their deep engagement with local communities makes them essential partners for implementing any national workforce strategy.

Based on these findings, this report puts forth a set of strategic recommendations centered on three pillars:

1. **Bridging the Skills Gap:** Launching national TVET programs for "Blue Technicians," strengthening university-industry linkages, and establishing a professional certification system to formalize skills.
2. **Fostering Employment Growth:** De-risking private sector investment in critical aquaculture value chains (feed and hatcheries), modernizing fisher cooperatives, and developing integrated "Blue Economy Hubs" in high-potential geographic zones.
3. **Harnessing Technology and Innovation:** Integrating digital and green skills into all training curricula and piloting technology-enabled solutions in areas like remote sensing, IoT-based monitoring, and digital market platforms.

Executing this roadmap will require a coordinated effort between government ministries, development partners, the private sector, and educational institutions. By aligning human capital development with strategic investment, Ethiopia can unlock the immense potential of its water resources, creating a resilient, inclusive, and prosperous Blue Economy for generations to come.

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## **Part I: The Strategic and Economic Context of Ethiopia's Blue Economy**

This part establishes the foundational context for the detailed workforce analysis. It examines the national policy architecture that underpins Ethiopia's Blue Economy

ambitions and provides an economic overview of the key water-based sectors, highlighting the significant gap between current reality and future potential.

## 1.1. National Vision and Policy Architecture

Ethiopia's foray into a structured Blue Economy is not an ad-hoc initiative but a deliberate, policy-driven endeavor. The cornerstone of this vision is the **National Blue Economy (BE) Strategy of Ethiopia 2023-2027**, a comprehensive framework aimed at promoting sustainable economic growth, improving livelihoods, and ensuring environmental stewardship through the judicious use of all water-based resources.<sup>1</sup> This strategy defines the Blue Economy inclusively, covering a wide range of activities derived from rivers, lakes, groundwater, and associated ecosystems, with key sectors identified as fisheries, aquaculture, tourism, transport, and energy.<sup>2</sup> The strategy's vision is to establish a functional governance and investment framework, develop and implement priority programs, and optimize the wealth-generating potential of its aquatic resources.<sup>2</sup>

This national strategy is strategically nested within broader regional and continental frameworks, demonstrating a coordinated approach to resource management and economic development. It aligns with the **Intergovernmental Authority on Development (IGAD) Regional Blue Economy Strategy**, which was endorsed in Addis Ababa in 2022, and the overarching **African Union's Agenda 2063**, which identifies the Blue Economy as a "new frontier of African renaissance".<sup>4</sup> This alignment is crucial, as it positions Ethiopia to leverage regional cooperation, access international expertise and communication platforms, and tap into development financing streams dedicated to these continental priorities.<sup>5</sup>

The Blue Economy Strategy does not operate in a vacuum; it is supported and operationalized by a suite of sector-specific national policies that provide the legal and strategic underpinnings for workforce development:

1. **Ten-Year Fishery and Aquaculture Master Plan (FAMP) 2024/25-2033/34:** Developed by the Ministry of Agriculture with World Bank assistance, this is arguably the most critical supporting document. It provides a strategic framework to dramatically enhance fish production, with a specific focus on unlocking Ethiopia's vast but untapped aquaculture potential.<sup>7</sup> The FAMP is

explicitly aligned with the National Blue Economy Strategy and aims to address food security, improve nutrition, and boost economic growth through sustainable fisheries and aquaculture development.<sup>8</sup>

2. **Ethiopian Water Resources Management Policy:** First issued in 1999, this foundational policy establishes water as a vital economic and social good, mandating its efficient, equitable, and sustainable utilization.<sup>10</sup> Crucially for the Blue Economy, the policy includes specific objectives to "enhance and promote the development of inland water transport to supplement the national economy"<sup>11</sup>, providing a direct policy link to the logistics and transport sub-sector.
3. **National Energy Policy:** This policy unequivocally designates hydropower as the "backbone of the country's energy sector development strategy," prioritizing its development as Ethiopia's most abundant and sustainable energy resource.<sup>13</sup> This policy underpins the most mature, formalized, and capital-intensive segment of the Blue Economy, driving demand for a wide range of engineering and technical professionals.<sup>13</sup>

The existence of this robust and interconnected policy architecture indicates a clear and high-level government commitment. However, a significant gap persists between these ambitious policies and their on-the-ground implementation. This "policy-practice gap" is a defining feature of Ethiopia's Blue Economy, suggesting that the primary challenges to growth and employment are not in vision but in execution—specifically, in capacity, investment, infrastructure, and human capital.

## 1.2. The Economic Contribution and Growth Potential of Water-Based Sectors

The economic landscape of Ethiopia's Blue Economy is one of immense but largely unrealized potential. The sector's current contribution to GDP is modest, but analysis of its core components reveals significant opportunities for growth and employment, particularly in aquaculture and its associated value chains.

**Inland Fisheries:** The capture fisheries sector, operating across Ethiopia's extensive lakes and rivers, is approaching its natural production limits. Annual production reached 101,000 tons in 2022, closing in on the estimated maximum sustainable yield of 127,969 tons.<sup>7</sup> The fishery is predominantly artisanal, involving an estimated 15,000 fishers, many of whom are part-time and use traditional, non-motorized vessels like

reed boats (

*tanquas*).<sup>16</sup> This indicates that future economic growth from wild-capture fisheries will not come from increasing volume but from improving management, reducing post-harvest losses, and enhancing value-chain activities.

**Aquaculture:** This sub-sector represents the single largest growth frontier within the Blue Economy. Ethiopia possesses over 15,158 km<sup>2</sup> of land highly suitable for aquaculture, with a staggering estimated production potential of **402,000 tons** per year by 2034.<sup>7</sup> Despite this, actual production in 2022 was a mere

**1,070 tons**, accounting for only about 1% of the country's total fish production.<sup>7</sup> This enormous disparity highlights a profound market and institutional failure. The sector is still in its infancy, characterized by small-scale, subsistence-oriented pond farming.<sup>4</sup> Overcoming the bottlenecks in this sector—chiefly the lack of quality feed and fingerlings—could unlock a massive wave of employment across the entire value chain, from input supply to production and processing.

**Water-Based Renewable Energy (Hydropower):** As the most developed component of the Blue Economy, hydropower is a cornerstone of the national economy. The current installed capacity from hydro sources is over 5,220 MW<sup>18</sup>, with an additional 8,864 MW under construction.<sup>19</sup> Major projects like the 6,450 MW Grand Ethiopian Renaissance Dam (GERD) exemplify the scale of investment and ambition.<sup>20</sup> The country's total hydropower potential is estimated to be as high as 45,000–60,000 MW, the second highest in Africa.<sup>14</sup> This sector is a major driver of formal employment for high-skilled professionals, particularly in engineering, project management, and technical operations.

**Tourism and Logistics:** While quantitative data is less precise, both water-based tourism and inland water transport are identified as priority areas in national strategies.<sup>4</sup> The presence of numerous tour operators offering packages around key water bodies, a growing number of lakeside resorts and lodges, and active community-based ecotourism projects (e.g., around Lake Tana and in the Rift Valley) demonstrates a functioning, albeit developing, tourism sector.<sup>23</sup> Similarly, the existence of logistics companies offering multimodal transport services that integrate inland dry ports points to the foundational elements of a water-based logistics network.<sup>27</sup>

A common thread across these sectors is the heavy reliance on international

development partners. The World Bank, Food and Agriculture Organization (FAO), United Nations Development Programme (UNDP), United States Agency for International Development (USAID), and German Agency for International Cooperation (GIZ) are deeply involved in nearly every facet of the Blue Economy. They provide critical funding for major water supply and infrastructure projects <sup>9</sup>, technical assistance for policy formulation <sup>30</sup>, support for community conservation and ecotourism initiatives <sup>31</sup>, and financing for capacity-building centers like the Fisheries and Aquaculture Business Development Centre (FABDC) on Lake Tana.<sup>33</sup> This dependence underscores a national capacity and funding gap, making the development of local human capital a paramount strategic priority to ensure the long-term sustainability and national ownership of the Blue Economy agenda.

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## **Part II: Occupational Landscape of Core Blue Economy Sectors**

This section presents a granular mapping of the employment opportunities across the primary sub-sectors of Ethiopia's Blue Economy. The analysis synthesizes data from national job platforms, government and NGO project documents, and academic reports to construct a detailed picture of the roles that constitute the current workforce, from informal artisanal positions to highly specialized technical and managerial careers.

### **2.1. Inland Fisheries and Aquaculture**

This sub-sector is characterized by a stark contrast between its large, predominantly informal capture fisheries workforce and its small but growing aquaculture segment, which holds the key to future employment expansion.

#### **2.1.1. Capture Fisheries**

Employment in wild-capture fisheries is largely informal and artisanal, centered

around major water bodies like Lake Tana, the Rift Valley lakes (Ziway, Chamo, Abaya), and various rivers.<sup>16</sup>

- **Fisher:** This is the most common role, comprising thousands of individuals engaged in direct harvesting. The majority are part-time or occasional fishers using traditional, non-motorized vessels such as papyrus reed boats (*tanquas*) and basic gear like gillnets, hooks, and traps.<sup>16</sup> Their work is physically demanding, often with low and unpredictable returns.
- **Fisher Cooperative Manager/Leader:** A semi-formal governance structure exists through over 68 fishermen's cooperatives, which organize approximately 2,790 full-time fishers.<sup>16</sup> These cooperatives have designated leaders or managers who are responsible for coordinating members, managing collective assets (like boats or nets), negotiating prices with traders, and representing the cooperative's interests. While providing a degree of organization, many of these cooperatives face challenges in management and effectiveness.<sup>36</sup>
- **Informal Fish Trader/Processor:** This downstream activity is a crucial source of employment, particularly for women.<sup>38</sup> These individuals purchase fish directly from landing sites and engage in small-scale processing activities such as gutting, sun-drying, and smoking. They then sell the products in local markets. This segment is plagued by high post-harvest losses due to the almost complete lack of a cold chain infrastructure.<sup>39</sup>

### 2.1.2. Aquaculture

Aquaculture is an emerging field with the potential to create a wide range of more formalized technical and support roles. However, the sector is currently nascent and faces significant bottlenecks.

- **Aquaculture Farm Technician/Manager:** This role involves the day-to-day management of fish farms, whether pond-based or cage culture systems. Responsibilities include managing stocking densities, administering feed, monitoring water quality parameters, preventing disease outbreaks, and overseeing harvesting.<sup>17</sup> This is identified as a critical skills gap area, with a severe shortage of trained personnel hindering the expansion of commercial farms.<sup>41</sup>
- **Hatchery Technician/Manager:** A highly specialized and vital role focused on the breeding of fish and the production of high-quality fingerlings (juvenile fish).



This is a primary constraint on the entire aquaculture value chain in Ethiopia.<sup>41</sup> Currently, the main sources of fingerlings are government-run research centers, such as the National Fishery and Aquaculture Research Center in Sebeta and the Bahir Dar Fisheries and Aquatic Life Research Center, and a handful of pioneering private companies like Alpha Fish Hatchery and Adey Business Development.<sup>33</sup>

- **Fish Feed Production Worker/Technician:** The lack of locally produced, affordable, and high-quality aquafeed is another major impediment to aquaculture profitability and growth.<sup>17</sup> This creates an opportunity for roles in feed formulation, production, and quality control. Companies like Alema Koudijs Feed are established players in the broader animal feed market and have the potential to expand into specialized aquafeed production.<sup>46</sup>
- **Formal Fish Processing Worker:** As aquaculture commercializes, there will be a growing need for workers in modern processing facilities. These roles would involve filleting, packaging, freezing, and quality control according to food safety standards (like HACCP) to serve both domestic and potential export markets.<sup>33</sup>

### 2.1.3. Support and Extension Services

- **Fisheries and Aquaculture Extension Officer:** These are typically government or NGO-employed professionals who act as a bridge between research/policy and the fishers/farmers on the ground.<sup>50</sup> They are responsible for delivering training on sustainable fishing practices, introducing new aquaculture technologies, promoting best management practices, and assisting with the organization and strengthening of fisher cooperatives.<sup>52</sup>
- **Fisheries Researcher/Scientist:** These academic and research-focused roles are based at universities like Addis Ababa University and Bahir Dar University, and at government bodies like the National Fishery and Other Aquatic Life Research Center.<sup>16</sup> Their work includes conducting fish stock assessments, studying aquatic ecology, researching fish genetics and diseases, and developing and adapting new aquaculture technologies suitable for the Ethiopian context.<sup>34</sup>

## 2.2. Water-Based Renewable Energy and Hydropower Operations



This sub-sector represents the most formalized, high-skill, and capital-intensive component of the Blue Economy. Employment opportunities are structured, with clear career paths and a demand for advanced technical qualifications.

- **Engineers (Civil, Electrical, Mechanical, Hydraulic):** Engineers are fundamental to every phase of a hydropower project, from feasibility and design to construction and operation. Job advertisements and project documents reveal a demand for specialized roles such as **Dam and Irrigation Maintenance Operation Engineer, Water Works Department Manager, and Hydropower Engineer**.<sup>56</sup> These positions require formal engineering degrees and often significant experience in large-scale infrastructure projects.
- **Hydropower Plant Operator/Technician:** These professionals are responsible for the hands-on, real-time operation of power generation facilities. Their duties include monitoring complex control boards, regulating water flow through turbines, synchronizing generators, and maintaining the equipment that generates electricity.<sup>59</sup> This role typically requires a high school diploma followed by extensive, multi-year on-the-job training or a specialized vocational degree.<sup>60</sup>
- **Substation Operator/Electrical Engineer:** These roles are focused on the transmission and distribution side of the power system. They manage the high-voltage substations that connect the power plant to the national grid, ensuring the stable flow of electricity.<sup>61</sup> An electrical engineering degree and experience in transmission systems are typically required.
- **Environmental and Social Governance (ESG) Specialists:**
  - **Environmental Impact Assessment (EIA) Specialist:** Given the significant environmental and social impacts of large dams, these consultants and in-house experts are crucial. They conduct studies to assess potential impacts on ecosystems, water flow, and communities, and design mitigation measures as required by national law and international funders like the World Bank.<sup>63</sup>
  - **Community Liaison Officer:** This role involves managing relationships with communities affected by dam construction and operation, addressing grievances, and overseeing resettlement and compensation programs.
- **Project and Contract Management:** Large hydropower projects are complex undertakings often involving international contractors and funders. This creates demand for **Project Managers, Contract Administrators, and Procurement Specialists** who can manage budgets, timelines, and contractual obligations according to international standards.<sup>56</sup>

### 2.3. Water-Based Tourism and Recreation

Employment in this sub-sector is a dynamic mix of formal roles within established companies, freelance opportunities for skilled individuals, and informal work rooted in local communities.

- **Tour Operator/Manager:** These are formal business roles within companies that create, market, and sell tourism packages. Responsibilities include researching destinations, negotiating contracts with hotels and transport providers, and managing logistics.<sup>64</sup> These positions require a blend of business acumen, marketing skills, and often multilingual capabilities to cater to an international clientele.<sup>23</sup>
- **Tour Guide (Eco-tourism/Boat Tour Guide):** This is a frontline role that can be either a formal employee of a tour company or a freelance service provider. A high-quality guide possesses deep knowledge of local history, culture, and ecology (e.g., birdwatching on Lake Tana), strong storytelling and communication skills, and, for water-based tours, certified boat handling and safety skills.<sup>67</sup> They are the linchpin of the visitor experience, particularly in community-based ecotourism (CBE) initiatives.<sup>26</sup>
- **Lodge and Resort Staff:** A wide spectrum of hospitality jobs exists in establishments situated near major water bodies. These range from **Lodge Managers** to service staff, chefs, and maintenance workers. Prominent examples include the Kuriftu Resort & Spa, Blue Nile Resort, and Abay Minch Lodge in Bahir Dar, near Lake Tana.<sup>24</sup>
- **Boat Captain/Operator:** This role involves transporting tourists for monastery visits on Lake Tana, hippo-watching on Lake Chamo, or general recreational boating. It exists in both formal (employed by a lodge or tour company) and informal (local boat owners offering rides) contexts. Formal roles increasingly require official certification in boat operation and passenger safety.
- **Community-Based Enterprise Coordinator/Facilitator:** An emerging and vital role within organized CBE projects, such as the Wanchi Ecotourism Association (WETA) and the Tama Community Conservation Area (TCCA).<sup>26</sup> These individuals, often supported by NGOs, are responsible for organizing local tourism services (e.g., guide associations, craft markets, homestays), managing revenue-sharing mechanisms, and acting as a liaison between the community, private tour

operators, and government authorities.

## 2.4. Integrated Water Resource and Ecosystem Management

This sub-sector is dominated by scientific, technical, and public-sector roles focused on the sustainable management and conservation of Ethiopia's aquatic ecosystems.

- **Hydrologist/Water Resource Engineer:** Employed by government bodies like the Ministry of Water and Energy (MoWE), Basin Development Authorities, or private consulting firms (e.g., MS Consultancy), these professionals focus on assessing and managing water resources. Their work includes water flow modeling, hydrological assessments for infrastructure projects, and developing integrated water management plans.<sup>57</sup>
- **Water Quality Analyst/Technician:** These are laboratory and field-based roles essential for monitoring the health of aquatic ecosystems. They conduct regular water sampling and chemical/biological analysis to detect pollutants from agriculture, industry, and urban areas, providing data that is critical for public health, fisheries management, and environmental protection.<sup>76</sup>
- **GIS and Remote Sensing Specialist:** This is a high-tech, data-driven role that has become indispensable for modern natural resource management. Specialists use Geographic Information Systems (GIS) and satellite imagery to map water bodies, monitor changes in wetland coverage, track land degradation and erosion in catchments, and provide spatial data to inform planning and policy decisions.<sup>78</sup> These experts are employed by research centers, government agencies, and conservation NGOs.
- **Wetland/Catchment Conservation Officer:** These are field-based positions, often with NGOs like the Ethio Wetlands and Natural Resources Association (EWNRA) or projects like the Water and Land Resource Centre's (WLRC) BRIGHT project.<sup>78</sup> They work directly with communities to implement conservation activities, such as rehabilitating degraded lands, establishing area closures, promoting soil and water conservation measures, and organizing community-based watershed management plans.<sup>81</sup>
- **Biodiversity/Wildlife Conservation Officer:** Employed by the Ethiopian Wildlife Conservation Authority (EWCA) and its partners, these officers are responsible for managing protected areas and conserving wildlife. In the context of the Blue

Economy, their work is crucial in areas where terrestrial and aquatic ecosystems are linked, such as in Nechisar National Park (bordering Lakes Abaya and Chamo) or Simien Mountains National Park (part of the Lake Tana Biosphere Reserve).<sup>68</sup>

The occupational landscape clearly illustrates a bifurcated labor market. The hydropower sector represents a formal, high-skill, capital-intensive track with defined engineering career paths. In stark contrast, the fisheries sector is a largely informal, low-skill, labor-intensive track with precarious employment. Aquaculture and tourism sit in the middle, with the potential to create a new tier of semi-skilled, formalized technical jobs if the right investments in human capital and infrastructure are made. Furthermore, in rural, water-dependent communities, NGOs and CBOs are the dominant meso-level employers, acting as the primary conduit for project implementation and capacity building in conservation and livelihoods. Any national workforce strategy must therefore recognize and engage with these organizations as essential partners.

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## **Part III: Analysis of the Blue Economy Workforce**

This part provides a cross-cutting analysis of the Blue Economy workforce, synthesizing the occupational data presented in Part II. It examines the specific professional competencies in demand, maps the educational and vocational pathways available, and analyzes the employment context, including a detailed look at compensation across different sub-sectors and role types.

### **3.1. Professional Competency and Skills Demand**

A detailed review of job descriptions, project documents, and institutional reports reveals a diverse and evolving set of skills required to power Ethiopia's Blue Economy. These can be categorized into technical, analytical, and interpersonal capabilities.

#### **3.1.1. Technical and Domain-Specific Skills**

Each sub-sector demands a unique set of hard skills, which are critical for operational effectiveness.

- **Inland Fisheries and Aquaculture:** The shift from subsistence to commercial operations requires a new cadre of technicians. Key skills include aquaculture system design and management (for ponds, cages, and Recirculating Aquaculture Systems - RAS), hatchery operations for fingerling production, scientific fish feed formulation, fish disease diagnostics and biosecurity protocols, and modern post-harvest processing techniques, including cold chain management to reduce spoilage.<sup>33</sup>
- **Water-Based Renewable Energy:** The hydropower sector demands high-level engineering competencies. These include dam design, structural integrity analysis, and safety inspection; turbine and generator maintenance and repair; electrical power system operation and control; and hydraulic modeling using software like HEC-RAS to predict water flow and energy generation potential.<sup>56</sup>
- **Aquatic Ecosystem Management:** This field requires a blend of laboratory and field skills. Water quality testing protocols (for chemical and biological contaminants), proficiency with GIS and Remote Sensing software (such as ArcGIS and QGIS) for spatial analysis, formal Environmental Impact Assessment (EIA) methodologies, biodiversity survey techniques for flora and fauna, and practical knowledge of soil and water conservation interventions are all in high demand.<sup>76</sup>
- **Water-Based Tourism:** Frontline tourism roles require practical skills in tour itinerary planning and logistics, multilingual communication abilities (with French, German, and Arabic often preferred alongside English), certified boat handling and passenger safety procedures, and techniques for effective cultural and ecological interpretation to enhance the visitor experience.<sup>64</sup>

### 3.1.2. Analytical and Digital Skills

Across all sectors, there is a clear and growing demand for digital literacy and analytical capabilities. The modernization of the Blue Economy is intrinsically linked to the adoption of data-driven approaches.

- **Data Analysis:** There is a need for professionals who can perform statistical analysis of fisheries catch data to inform stock assessments, model water flow regimes for hydropower and irrigation, and conduct economic analysis of value chains.<sup>34</sup>
- **GIS and Remote Sensing:** This is one of the most sought-after cross-cutting skills. It is essential for mapping water resources, monitoring deforestation and erosion in watersheds, tracking the spread of invasive species like water hyacinth on Lake Tana, and identifying suitable sites for aquaculture development.<sup>78</sup>
- **Specialized Software and Platforms:** There is an emerging demand for proficiency in specific digital tools. USAID-funded WASH projects, for instance, utilize the **mWater** mobile application for data collection and **Power BI** or **Tableau** for creating management dashboards.<sup>76</sup> The tourism sector is beginning to explore the use of **Artificial Intelligence (AI)** for personalized recommendations and customer support chatbots.<sup>65</sup>

### 3.1.3. Interpersonal and Communication Capabilities

Often termed "soft skills," these capabilities are consistently highlighted as non-negotiable requirements, particularly for roles that interface with communities and multiple organizations.

1. **Stakeholder Engagement and Community Mobilization:** This is the most critical soft skill for community-facing roles. Fisheries Extension Officers, Catchment Conservation Officers, and Community-Based Ecotourism Facilitators must be able to build trust, facilitate dialogue, organize community groups (like cooperatives or water user associations), and integrate local knowledge into project design and implementation.<sup>52</sup>
2. **Project Management and Coordination:** Given the heavy involvement of international donors and multiple government agencies, the ability to manage complex projects, coordinate between different partners, write clear reports, and manage budgets is essential for almost all mid- to senior-level positions.<sup>57</sup>
3. **Cross-cultural Communication:** This is paramount in the tourism sector for interacting with international visitors and is also vital for development professionals working in Ethiopia's diverse regions.<sup>65</sup>

## 3.2. Educational and Vocational Pathways

The human capital pipeline for the Blue Economy is characterized by strengths at the university level and significant weaknesses in vocational training, creating a "missing middle" of skilled technicians.

### 3.2.1. Formal University Qualifications

Several Ethiopian universities are key sources of high-level talent for the Blue Economy.

- **Bahir Dar University:** Located on the shores of Lake Tana, this university is a critical hub. Its **College of Agriculture and Environmental Sciences** offers a comprehensive suite of relevant programs, including a BSc in Fisheries and Aquatic Sciences, an MSc in Fisheries and Aquaculture, and a PhD in Fisheries and Aquaculture. It also hosts an Aquatic and Wetland Ecosystems Management Research Unit and a Blue Nile Water Institute, making it a center of excellence for research and training in the sector.<sup>54</sup>
- **Addis Ababa University:** The Department of Zoological Sciences within the College of Natural and Computational Sciences offers programs and conducts research with a focus on fisheries, aquatic ecology, and limnology, producing graduates who can fill roles in research and higher-level management.<sup>34</sup>
- **Engineering Faculties:** Various universities across the country with strong engineering programs serve as the primary pipeline for the hydropower sector, producing graduates with degrees in Civil, Electrical, Mechanical, and Water Resources Engineering.<sup>57</sup>

### 3.2.2. Technical and Vocational Education and Training (TVET)

This is the most significant area of weakness in the workforce development system.



There is a clear and widely acknowledged deficit of dedicated TVET programs for the hands-on technical skills needed to drive growth.

- Reports and sector analyses consistently point to a shortage of trained **aquaculture technicians, boat mechanics, fish processing specialists, and hatchery managers** as a major constraint.<sup>33</sup>
- The establishment of the **Fisheries and Aquaculture Business Development Centre (FABDC)** on Lake Tana, a joint initiative with UNIDO and Russia, is a direct response to this gap and aims to provide vocational training and business development services.<sup>33</sup>
- In the hydropower sector, many technician-level roles are filled not through formal TVET programs but through lengthy on-the-job apprenticeships, indicating an opportunity to formalize and standardize this training.<sup>60</sup>

This gap in the "missing middle" of the skills pipeline is a critical bottleneck, as it is precisely these semi-skilled technical roles that have the potential for the largest-scale job creation, particularly in the expanding aquaculture sector.

### 3.3. Employment Context and Compensation Landscape

The Blue Economy workforce is employed across a diverse range of organizations, with contract types and compensation levels varying dramatically between sub-sectors.

#### 3.3.1. Employer Landscape

- **Government and Public Sector:** Key employers include the **Ministry of Agriculture** (specifically its Fisheries Directorate), the **Ministry of Water and Energy**, state-owned enterprises like **Ethiopian Electric Power (EEP)**, and regulatory bodies like the **Ethiopian Wildlife Conservation Authority (EWCA)** and regional bureaus.<sup>50</sup>
- **Private Sector:** This includes a growing number of commercial enterprises such as aquaculture farms (e.g., Alpha Fish Hatchery), animal feed producers with aquaculture potential (e.g., Alema Koudijs), a multitude of tour and travel

operators, logistics and shipping companies (e.g., Akakas Logistics, ESLSE), and specialized engineering consultancy firms (e.g., MS Consultancy).<sup>23</sup>

- **NGOs and Community-Based Organizations (CBOs):** These are critical employers, especially in rural areas. Examples include conservation NGOs like the **Ethio Wetlands and Natural Resources Association (EWNRA)**, legally registered **Fisher Cooperatives**, and **Community Conservation Associations** managing local resources.<sup>31</sup>
- **Research and Academia:** Universities like AAU and Bahir Dar, along with national research centers, employ scientists, researchers, and academics who support the Blue Economy through knowledge generation and innovation.<sup>34</sup>

### 3.3.2. Contract Arrangements and Compensation

The compensation structure within the Blue Economy reflects the "dual workforce" reality. Formal, high-skill roles offer stable salaries, while informal work is characterized by low and precarious incomes. The following table provides an estimated snapshot of monthly compensation ranges, compiled from job advertisements, salary survey data, and freelance platform rates. It serves as a critical market intelligence tool for understanding the financial viability of different career paths.

**Table 1: Estimated Monthly Compensation Ranges for Key Blue Economy Occupations in Ethiopia (as of mid-2025)**

Job Title	Sub-Sector	Employment Type	Experience Level	Estimated Monthly Compensation (ETB)	Key Data Sources
<b>Hydropower Engineer</b>	Energy	Formal (Permanent)	Mid-Level (4-6 yrs)	14,000 - 25,000	58
<b>Water Works Dept. Manager</b>	Water Infrastructure	Formal (Permanent)	Senior (10+ yrs)	35,000 - 50,000+	57
<b>GIS/Remote</b>	Ecosystem	Freelance	Mid-Level	55,000 -	98

<b>Sensing Specialist</b>	Mgt.	(Int'l Project)	(5+ yrs)	110,000 (equiv. to \$1000-\$2000)	
<b>Aquaculture Technician</b>	Aquaculture	Formal (Permanent)	Entry-Level (0-2 yrs)	5,000 - 8,000 (Estimated)	51
<b>Fisheries Extension Officer</b>	Fisheries/Go vt.	Formal (Contract/Perm)	Mid-Level (5+ yrs)	12,000 - 18,000 (Estimated)	101
<b>Eco-Tour Guide</b>	Tourism	Gig/Freelance	N/A	10,000 - 25,000 (Highly Variable)	102
<b>Logistics Officer (WASH Project)</b>	Support Services	Formal (Contract)	Mid-Level (4+ yrs)	15,000 - 22,000 (Estimated)	88
<b>Artisanal Fisher</b>	Fisheries	Informal/Self-employed	N/A	< 5,000 (Highly Variable, Seasonal)	105

*Note: Estimates are derived from available data and are intended to show relative scales. Actual salaries can vary significantly based on employer, location, and specific project funding.*

The compensation data reveals a significant financial disincentive for entering key growth sectors. An entry-level aquaculture or fisheries role may offer a salary that is less than half of what an entry-level engineering graduate can command. This compensation gap poses a major challenge to attracting the necessary talent to modernize the fisheries and aquaculture sectors. For these fields to become attractive career paths for young Ethiopians, it is not sufficient to simply create jobs; the underlying economics of the sectors must be improved through technology, better inputs, and market access to support higher productivity and, consequently, higher wages.

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## Part IV: Strategic Recommendations for Workforce Development and Growth

The preceding analysis of Ethiopia's Blue Economy reveals a landscape of immense potential constrained by specific, addressable gaps in human capital, investment, and policy implementation. To translate the national vision into a reality of sustainable growth and widespread employment, a set of targeted, multi-stakeholder interventions is required. This section outlines a strategic roadmap with actionable recommendations for government bodies, development partners, educational institutions, and the private sector.

### 4.1. Bridging the Skills Gap: A Human Capital Investment Plan

The most critical barrier to progress is the "missing middle" in the workforce pipeline—the severe deficit of skilled technicians. Addressing this requires a foundational investment in human capital.

1. **Recommendation 1: Launch National TVET Programs for "Blue Technicians."**  
The Ministry of Education, in partnership with the Ministry of Agriculture and relevant regional bodies, should spearhead the development and accreditation of standardized Technical and Vocational Education and Training (TVET) programs. These programs should be practical, industry-aligned, and lead to recognized certifications. Priority areas for curriculum development include:
  1. **Aquaculture Systems Technology:** Covering practical skills in pond and cage construction, water quality management, feed and nutrition science, and disease prevention and control.
  2. **Hatchery Management and Fingerling Production:** A specialized track to address the critical seed bottleneck, focusing on breeding techniques, larval rearing, and fingerling distribution.
  3. **Fish Post-Harvest Technology and Cold Chain Management:** Focusing on modern processing techniques (filleting, smoking, freezing), quality control, food safety standards (HACCP), and the operation of cold storage and

refrigerated transport.

4. **Marine and Small Craft Engine Maintenance:** A vital program to support both the fishing and water-based tourism sectors by creating a cadre of qualified boat mechanics.
2. **Recommendation 2: Strengthen University-Industry-Government Linkages.** To ensure higher education remains relevant and drives innovation, formal partnerships must be established. This includes creating a tripartite consortium involving key universities (especially Bahir Dar University and Addis Ababa University), leading private sector players (like Alpha Fish Hatchery and Kuriftu Resorts), and government research centers (like the National Fishery and Other Aquatic Life Research Center). This consortium would facilitate mandatory internship programs for students, align university curricula with industry needs, and launch joint R&D projects focused on solving key sector challenges, such as developing local aquafeed ingredients or breeding more productive fish strains.<sup>33</sup>
3. **Recommendation 3: Establish a Professional Certification and Licensing System.** To professionalize the workforce and ensure quality and safety, relevant authorities (e.g., Ministry of Tourism, Ministry of Transport, Ministry of Agriculture) should develop and enforce a mandatory certification and licensing system for key frontline roles. This would include certified credentials for **Tour Guides, Boat Captains** (with different levels for passenger and cargo vessels), and **Aquaculture Technicians**. This would not only improve service quality and safety but also enhance the employability and career progression prospects for individuals in these fields.

## 4.2. Fostering Employment Growth: Policy and Investment Priorities

Creating a skilled workforce is necessary but not sufficient; demand for that workforce must be stimulated through targeted policy and investment.

1. **Recommendation 4: De-risk Private Sector Investment in Critical Aquaculture Value Chains.** The primary constraints to aquaculture's growth and job creation potential are the lack of affordable, high-quality local **fish feed** and **fingerlings**.<sup>17</sup> The government, supported by development banks (World Bank, AfDB), should create blended finance mechanisms (e.g., matching grants, loan guarantees, low-interest loans) specifically to de-risk and incentivize private

sector investment in the establishment of commercial-scale **aquafeed mills** and **multi-species hatcheries**. This single intervention would have a catalytic effect on the entire sub-sector, enabling thousands of small and medium-sized fish farms to become viable and creating direct and indirect employment.

2. **Recommendation 5: Support the Formalization and Modernization of Fisher Cooperatives.** Fisher cooperatives are the primary organizational structure for artisanal fishers but are often hampered by weak management and outdated equipment.<sup>36</sup> Development programs should provide targeted capacity building to cooperatives in business management, financial literacy, and collective marketing. This should be coupled with facilitating access to credit for modernizing their assets, such as acquiring more efficient motorized boats and modern, selective fishing gear. Furthermore, investment in shared **community-level cold chain infrastructure**, such as solar-powered ice-making machines and cold rooms at major landing sites, would drastically reduce post-harvest losses, increase fisher incomes, and make fishing a more stable and formal occupation.<sup>39</sup>
3. **Recommendation 6: Develop Integrated "Blue Economy Hubs" in Key Geographic Hotspots.** Rather than a scattered approach, investment and workforce development programs should be concentrated in geographic areas with high potential and existing synergies. Key hubs should be designated and developed in:
  1. The **Lake Tana Region**: As a hub for fisheries, aquaculture, water-based tourism, and academic research (Bahir Dar University).
  2. The **Rift Valley Lakes Region (Ziway, Abaya, Chamo)**: As a hub for tourism, conservation, and fisheries.
  3. **Hydropower Development Corridors (e.g., Blue Nile, Omo)**: As hubs for energy generation, large-scale irrigation, and integrated water resource management.

#### 4.3. Harnessing Technology and Innovation for Future Roles

Ethiopia can leapfrog legacy systems by embedding technology and green principles into its Blue Economy development from the outset.

1. **Recommendation 7: Integrate Digital and Green Skills into all Training.** All TVET and university curricula related to the Blue Economy must include mandatory modules on relevant digital tools (e.g., introduction to GIS, mobile data collection apps, basic data management) and green economy principles (e.g., sustainable resource management, circular economy concepts, climate change adaptation). This ensures the future workforce is both digitally competent and environmentally literate.
2. **Recommendation 8: Pilot and Scale Technology-Enabled Solutions.** The government and its partners should establish an innovation fund to support startups and pilot projects in emerging high-tech niches. This would create new categories of employment and improve the efficiency of the entire sector. Priority areas for pilots include:
  1. **Remote Sensing and Drone Operations** for cost-effective monitoring of water quality, aquatic habitat health, and illegal fishing activities.
  2. **Internet of Things (IoT)-based Systems** for real-time monitoring of water parameters (pH, oxygen, temperature) in aquaculture ponds and cages, enabling precision fish farming.
  3. **Digital Platforms and Mobile Applications** that create "boat-to-plate" traceability systems to improve food safety and market access, or that directly connect fishers and aquaculture farmers to buyers, cutting out inefficient intermediaries.
3. **Recommendation 9: Build Capacity in Blue Carbon and Ecosystem Services Valuation.** While the market is still nascent globally, blue carbon represents a significant future opportunity for Ethiopia to monetize the conservation of its vast wetland ecosystems.<sup>107</sup> To prepare for this, Ethiopia should begin building national capacity now. This involves supporting universities and research institutes to train a new class of **Ecosystem Services Valuation Experts**. These experts would be tasked with conducting rigorous scientific and economic assessments to quantify the value of Ethiopia's aquatic ecosystems (e.g., carbon sequestration in wetlands, water purification services), laying the essential groundwork for future participation in international carbon markets or developing national payment-for-ecosystem-services (PES) schemes.

#### 4.4. A Roadmap for Implementation



To ensure these recommendations translate into action, a clear implementation framework is necessary. The following table provides a high-level roadmap, assigning primary actors and suggesting timelines for key initiatives.

Recommendation	Key Initiative	Primary Actors	Timeline	Key Performance Indicators (KPIs)
<b>1. Launch TVET Programs</b>	Develop and accredit curricula for Aquaculture, Post-Harvest, and Boat Mechanics.	Ministry of Education, Regional TVET Agencies, Ministry of Agriculture	Short-Term (1-2 years)	Number of accredited TVET programs launched; Number of students enrolled.
<b>4. De-risk Private Investment</b>	Establish a blended finance facility for aquaculture inputs.	Ministry of Finance, Development Bank of Ethiopia, World Bank, AfDB	Short-Term (1-2 years)	Value of private investment mobilized in feed mills/hatcheries; Increase in local production of quality feed and fingerlings.
<b>5. Modernize Cooperatives</b>	Launch a national program for cooperative capacity building and asset modernization.	Ministry of Agriculture, Cooperative Promotion Agency, NGOs	Medium-Term (3-5 years)	Percentage increase in cooperative members' income; Reduction in post-harvest fish losses.
<b>3. Establish Certification System</b>	Develop and legislate licensing standards for guides and boat captains.	Ministry of Tourism, Ministry of Transport	Medium-Term (3-5 years)	Number of professionals certified/licensed; Reduction in tourism-related safety incidents.
<b>8. Pilot Tech</b>	Launch a Blue	Ministry of	Medium-Term	Number of

<b>Solutions</b>	Economy Innovation Fund for startups.	Innovation and Technology, Ethio Telecom, Development Partners	(3-5 years)	tech-enabled pilot projects funded and scaled; Number of new jobs in "blue tech" roles.
<b>9. Build Blue Carbon Capacity</b>	Fund a national ecosystem services valuation project.	Ministry of Environment, Addis Ababa University, Bahir Dar University, UNEP	Long-Term (5+ years)	Publication of a national valuation report; Number of trained ecosystem valuation experts.

By systematically implementing this integrated strategy—focusing simultaneously on building skills, stimulating demand, and fostering innovation—Ethiopia can effectively harness its vast water resources. This will not only create a diverse spectrum of employment opportunities but also build a more resilient, sustainable, and prosperous economic future for its people.

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# **Ethiopia's Bronze Economy: A Comprehensive Employment Map for National Workforce and Policy Strategy (2025)**

## **Part I: The National Employment Landscape and Institutional Framework**

### **Section 1: Overview of Ethiopia's Bronze Economy Workforce**

#### **1.1. Macroeconomic Context and Strategic Imperatives**

The Federal Democratic Republic of Ethiopia stands at a critical juncture in its development trajectory. The nation's economic agenda is propelled by a series of ambitious, high-level strategic frameworks designed to catalyze a profound structural transformation. Central among these are the second Growth and Transformation Plan (GTP II) and its successor, the current 10-Year Development Plan (2020-2030).<sup>1</sup> These blueprints articulate a vision for Ethiopia to achieve lower-middle-income status, predicated on maintaining an annual real Gross Domestic Product (GDP) growth rate of approximately 11%.<sup>1</sup> This rapid economic expansion is intended to be driven by significant growth in key industrial sectors, with the mining sector, for instance, projected to grow at an astonishing annual average rate of 32.8%.<sup>1</sup>

Underpinning this entire vision is the foundational national strategy of "Agricultural Development-Led Industrialization" (ADLI). This long-standing policy explicitly positions the primary sectors—agriculture, livestock, forestry, and mining (collectively

termed the "Bronze Economy" for this report)—as the central engine of Ethiopia's development process.<sup>3</sup> The logic of ADLI is that growth in these foundational sectors will create the necessary capital, raw materials, and market demand to fuel industrialization and absorb a rapidly growing labor force. The government's focus, as outlined in strategies like the Plan for Accelerated and Sustained Development to End Poverty (PASDEP), is on accelerating market-based agricultural development, with a particular emphasis on the country's millions of smallholder farm households.<sup>3</sup>

However, a significant gap persists between these strategic ambitions and the prevailing economic realities. Despite periods of strong growth, the transformation has not been deep enough to provide sufficient employment for the approximately two million new job seekers entering the labor market each year.<sup>4</sup> This has contributed to a challenging socioeconomic landscape where poverty, after a period of decline, actually increased between 2016 and 2021.<sup>4</sup> The national goal of transforming into a lower-middle-income industrial economy by 2025, as envisioned in GTP II, faces considerable headwinds.<sup>2</sup> The core challenge lies in translating macroeconomic growth targets into tangible improvements in productivity, income, and quality employment for the majority of the population. This report, therefore, is designed to map the employment landscape of the Bronze Economy to identify the specific labor-related bottlenecks and opportunities that will determine the success or failure of Ethiopia's national transformation agenda.

## **1.2. Labor Force Contribution and Structural Realities**

The Bronze Economy is not merely a sector of the Ethiopian economy; it is the fundamental bedrock of its entire socio-economic structure, particularly concerning employment. The agricultural sector, in its broadest sense, is the primary source of livelihood for the vast majority of Ethiopians. Credible estimates indicate that agriculture employs between 70% and 85% of the total national workforce.<sup>3</sup> A 2023 modeled estimate from the International Labour Organization (ILO) places employment in agriculture (including hunting, forestry, and fishing) at 62.37% of total employment.<sup>6</sup> This sector is also a cornerstone of the national economy, accounting for a substantial portion of GDP, with figures ranging from 32% to 47% in recent years, and generating up to 90% of the country's foreign exchange earnings from exports.<sup>3</sup>

Disaggregating this further reveals the immense scale of employment within each sub-sector. The livestock sub-sector alone provides employment for over 30% of the agricultural labor force, highlighting its critical role in rural economies.<sup>8</sup> The forestry sector's contribution is even more staggering, though often under-documented. One comprehensive analysis suggests that an estimated 57 million people—more than half of the nation's population—are engaged in full- or part-time work related to forestry, with over 11 million rural households relying almost exclusively on forest resources for their sustenance.<sup>9</sup>

The mining sector presents a dualistic structure. The Artisanal and Small-Scale Mining (ASM) sub-sector is a massive source of informal employment, directly engaging over 1.2 million people and supporting the livelihoods of an additional 7.5 million.<sup>10</sup> This stands in contrast to the nascent Large-Scale Mining (LSM) sector, which is more capital-intensive but represents a key area for future growth and foreign investment.<sup>13</sup>

This immense employment base is characterized by a deep and persistent formal-informal dichotomy. The overwhelming majority of workers within the Bronze Economy are engaged in subsistence farming, pastoralism, or informal artisanal activities. Their work is often seasonal, precarious, and operates entirely outside the structures of formal employment contracts, tax systems, and social protections.<sup>3</sup> This structural reality presents a formidable challenge for policymakers, as the very people whose productivity must be enhanced to achieve national goals are the most difficult to reach through conventional policy instruments. Understanding the nuances of these employment arrangements is therefore a prerequisite for designing effective workforce development and sector planning strategies.

**Table 1.1: Macroeconomic and Employment Contribution of Primary Sectors (2023-2025 Est.)**

Sector	% of GDP	% of Total National Employment (Modeled ILO Estimate)	% of Export Earnings	Key Government Strategy/Target
<b>Agriculture</b>	32% <sup>7</sup> - 47% <sup>3</sup>	62.37% (incl. forestry & fishing) <sup>6</sup>	~90% <sup>3</sup>	Agricultural Development-Led

				Industrialization (ADLI); Agricultural Growth Program (AGP) <sup>3</sup>
<b>Livestock</b>	19% (as part of Ag. GDP) <sup>8</sup>	>30% of agricultural labor force <sup>8</sup>	16-19% <sup>8</sup>	National Livestock and Fisheries Extension Strategy; Value Chain Development <sup>15</sup>
<b>Forestry</b>	12.9% <sup>9</sup>	Est. 57 million people (full/part-time) <sup>9</sup>	Significant (e.g., honey, bamboo, gums) <sup>9</sup>	National Forest Sector Development Program (NFSDP); Green Legacy Campaign <sup>9</sup>
<b>Mining (ASM)</b>	Major contributor to the 2% total mining GDP <sup>2</sup>	>1.2 million direct jobs <sup>10</sup>	~65% of mineral export earnings <sup>10</sup>	Artisanal Mining National Strategy; Formalization efforts <sup>10</sup>
<b>Mining (LSM)</b>	Part of the 2% total mining GDP <sup>2</sup>	Low but targeted for growth	Remainder of mineral exports	Increase mining sector's GDP contribution to 10% by 2025 <sup>2</sup>

*Note: Figures are synthesized from multiple sources and represent recent estimates. The employment figure for agriculture from the ILO is a modeled estimate and includes forestry and fishing. The forestry employment figure is a broad estimate reflecting full and part-time reliance.*

## Section 2: The Evolving Labor Market Infrastructure

## 2.1. The Rise of Digital Labor Platforms

In tandem with its economic aspirations, Ethiopia's labor market infrastructure is undergoing a significant, albeit uneven, modernization. A key feature of this evolution is the emergence and growing influence of digital labor platforms that are transforming the landscape of formal sector recruitment. These platforms serve as the primary interface between employers and job seekers for professional, skilled, and semi-skilled roles, particularly in urban centers.

Leading this digital wave is **Ethiojobs**, which has established itself as a premier job board in the country. Boasting an influential network of over one million active candidates and attracting 30,000 daily visitors, Ethiojobs has become a central hub for talent acquisition.<sup>18</sup> It offers a suite of tools designed to optimize the recruitment process for employers and streamline the job search for candidates, including personalized job alerts and CV management features.<sup>18</sup> The platform is part of the broader Africa Jobs Network, which has 25 years of experience in HR and recruitment across the continent, lending it significant credibility and reach.<sup>18</sup>

Another prominent player is **GeezJobs**, which provides a comprehensive array of human resource services that extend beyond simple job postings. GeezJobs offers recruitment, CV writing, outsourcing, and payroll management, positioning itself as an end-to-end HR partner for businesses.<sup>20</sup> The platform's powerful search filters allow users to narrow down opportunities by a wide range of criteria, including industry, education level, experience, job type (permanent, contract, freelance), and salary range, catering to a diverse set of formal employment needs.<sup>20</sup>

Similarly, **HarmeeJobs** has carved out a niche as a trusted source for job opportunities, career advice, and HR news in Ethiopia.<sup>21</sup> It hosts vacancies from a variety of employers, including prominent NGOs like the Ethiopian Red Cross Society and Save the Children, as well as private sector firms.<sup>21</sup> These platforms collectively represent a critical shift towards a more transparent, efficient, and accessible formal labor market, at least for those with the digital literacy and connectivity to participate.



## 2.2. Advanced Human Capital Services

Beyond the foundational job boards, a new tier of more sophisticated human capital services is beginning to operate in Ethiopia, signaling a maturation of the market and catering to the needs of international business and data-driven workforce planning.

**Deel** represents a significant innovation in facilitating foreign investment and remote work. It offers a comprehensive Employer of Record (EOR) solution, which allows international companies to hire employees in Ethiopia without needing to establish a local legal entity.<sup>22</sup> Deel manages the complexities of local employment laws, tax systems, payroll, and benefits administration, including pension fund contributions. By handling these bureaucratic hurdles, Deel dramatically reduces the friction of hiring local talent, claiming to shorten the average onboarding time to just four business days.<sup>22</sup> This service is crucial for attracting foreign direct investment and integrating Ethiopian talent into the global remote workforce.

At the cutting edge of labor market technology is **HaHuJobs**. This platform transcends the traditional job board model to function as a data-driven ecosystem for human capital management.<sup>23</sup> Its core innovation lies in its mission to capture structured data on the Ethiopian labor market. HaHuJobs utilizes a strong biometric-based system for jobseeker identification, creating a digital pool of verified workers.<sup>24</sup> It then employs automated matching algorithms to connect the right candidates with appropriate vacancies based on structured data formats.

Crucially, HaHuJobs has developed sub-services tailored to specific stakeholders, including modules for industrial parks, Technical and Vocational Education and Training (TVET) institutions, and universities.<sup>24</sup> These modules are designed to trace graduates, track their employment status, and provide educational institutions with valuable insights into labor market demands and competence requirements. The platform's advisory board includes PhD candidates and program leads in labor and development economics from prestigious institutions like the University of Oxford, underscoring its highly sophisticated, research-backed approach to tackling systemic labor market challenges.<sup>23</sup> HahuJobs represents a potential blueprint for a national, data-rich Labor Market Information System (LMIS) that could provide policymakers with unprecedented visibility into the country's human capital pipeline.

The emergence of these digital platforms and advanced services, however, throws a

crucial structural challenge into sharp relief. A "Great Divide" is evident between the digitally-enabled, data-rich formal labor market and the analogue, data-poor informal economy where the vast majority of the Bronze Economy workforce resides. The services offered by Deel, Ethiojobs, and even the advanced HahuJobs are designed for a specific user: a literate, digitally connected individual with a formal curriculum vitae seeking salaried employment. This profile is fundamentally different from that of the typical smallholder farmer, pastoralist, or artisanal miner. These workers, who form the backbone of the Bronze Economy, operate entirely outside this digital paradigm. Their employment is secured not through online applications but through local community ties, seasonal patterns, and informal arrangements.<sup>3</sup>

Consequently, relying solely on data from these platforms would provide a dangerously incomplete picture of the national employment landscape. It would capture the "tip of the iceberg"—the formal, professional, and urban-based roles—while completely missing the massive, informal, and rural base. This creates a critical blind spot for policymakers attempting to formulate comprehensive workforce development strategies. The very existence of specialized platforms like Dereja, which focuses specifically on the youth unemployment challenge for fresh graduates needing experience, is a market-driven admission of this disconnect between formal education and employment readiness.<sup>18</sup> While the current scope of these platforms is limited, the model pioneered by HahuJobs—using structured data and targeted modules for specific groups—holds the key to bridging this divide. The single most significant opportunity for creating a truly comprehensive and functional national LMIS lies in expanding this data-driven approach from industrial parks and universities to the core actors of the Bronze Economy, such as agricultural cooperatives and mining associations. Such an expansion could, for the first time, make the invisible workforce visible, enabling data-driven policy for the entire nation.

## **Part II: Sector-Specific Employment Deep Dive**

### **Section 3: The Agricultural Workforce: From Subsistence to Commercialization**

### **3.1. Employment Structure**

The agricultural sector is the linchpin of the Ethiopian workforce, defined by a structure that is simultaneously vast and fragmented. The sector's employment landscape is overwhelmingly dominated by smallholder farming. An estimated 13 million smallholder farm households form the core of the agricultural economy, collectively responsible for producing around 98% of the country's total agricultural output.<sup>3</sup> This structure means that the livelihoods of the vast majority of the rural population are tied to small, often degraded, plots of land, with productivity levels that are generally low.<sup>3</sup>

Employment within this context is largely subsistence-based. For millions of households, farming is not just an occupation but a way of life, geared primarily towards ensuring household food security. This heavy reliance on rain-fed agriculture makes the workforce exceptionally vulnerable to the increasing frequency of adverse weather events, such as droughts and floods, which directly undermine livelihoods and exacerbate food insecurity.<sup>4</sup> In 2023, it was estimated that over 20 million people faced severe food insecurity, a direct consequence of these vulnerabilities.<sup>4</sup>

Recognizing this fragility, a central thrust of government and development partner strategy is to catalyze a transition from subsistence to commercialized agriculture. The World Bank-supported Agricultural Growth Project (AGP) and its successor, AGPII, are flagship initiatives in this endeavor. These programs have targeted millions of smallholder farmers with improved access to agricultural services, new technologies, and critical infrastructure, most notably small-scale irrigation schemes. The promotion of irrigation is a key strategy to break the dependence on unreliable rainfall, allowing farmers to harvest multiple times a year and diversify from staple cereals to higher-value horticultural crops.<sup>5</sup> These interventions are slowly reshaping the employment structure, creating a pathway, however challenging, for smallholders to become market-oriented producers.

### **3.2. Key Actors and Interventions**

The transformation of the agricultural workforce is being steered by a complex ecosystem of state, non-governmental, and international actors. At the apex of the governmental structure is the **Ministry of Agriculture (MoA)**, the federal body responsible for overseeing all agricultural and rural development policies, established in 1995.<sup>25</sup> The MoA's mandate covers a broad spectrum, from conservation and food security to promoting agricultural development and managing early warning systems.<sup>26</sup>

Working in concert with the MoA is the **Ethiopian Agricultural Transformation Institute (ATI)**, formerly the Agricultural Transformation Agency (ATA). The ATI is a specialized, delivery-oriented government institute created specifically to accelerate the growth and transformation of the agriculture sector.<sup>27</sup> It plays a crucial role in identifying systemic bottlenecks and implementing targeted, high-impact interventions, often in collaboration with a wide range of partners.

International partners are indispensable to this effort, providing critical financing and technical expertise. The **World Bank**, through its International Development Association (IDA), is a primary funder of large-scale programs like the AGP, which aim to boost productivity and market access for smallholders.<sup>4</sup>

Non-governmental organizations (NGOs) are vital for implementation at the grassroots level, working directly with farming communities. **Nuru Ethiopia**, for example, focuses on building farmer-owned and farmer-led agribusinesses to lift families out of extreme poverty. Headquartered in Arba Minch and working in the South Ethiopia Regional State, Nuru has supported over 200 agribusinesses and reached 180,000 people, demonstrating a model that significantly increases farmer incomes.<sup>29</sup> Another key player is the

**Sasakawa Africa Association (SAA)**, which has operated in Ethiopia since 1993. SAA's model focuses on strengthening the national agricultural extension system by training extension agents (known as Development Agents) and smallholder farmers in regenerative, nutrition-sensitive, and market-oriented agriculture.<sup>30</sup> These organizations, along with others like the Consortium of Christian Relief and Development Association (CCRDA) and Agri Service Ethiopia<sup>31</sup>, form a dense network of support aimed at modernizing the agricultural workforce from the ground up.

### 3.3. Skill Demand Profile

While the bulk of the agricultural workforce consists of smallholder farmers, an analysis of formal job vacancies reveals a clear and growing demand for a cadre of highly skilled professionals to lead the sector's modernization. These roles require advanced education and specialized technical expertise, painting a picture of the future direction of agricultural employment.

A review of job postings on platforms like Ethiojobs shows a consistent demand for **Agronomists**. These positions, offered by employers ranging from private agricultural firms to NGOs like Farm Africa, typically require a Master's or Bachelor's degree in Plant Science, Agronomy, or a related field.<sup>32</sup> The required skill set is indicative of a shift towards more sophisticated farming practices. Employers seek expertise in climate-smart agriculture (CSA), integrated soil fertility management, post-harvest handling, and the use of technical software for crop modeling and analysis, such as CropWat and AquaCrop.<sup>32</sup> This demonstrates that the sector is moving beyond basic cultivation to a more scientific, data-informed approach to production.

Similarly, high-level policy and economic expertise is in demand. A vacancy for an **Agriculture Specialist** at the U.S. Embassy in Addis Ababa called for a minimum of four to five years of experience in agricultural economics, policy analysis, and commodity trade.<sup>34</sup> The role involves monitoring and reporting on complex agricultural developments, highlighting the need for professionals who can navigate the intersection of agriculture, trade, and international relations.

The digital transformation of the sector is also creating new and specialized roles. The Ethiopian Agricultural Transformation Institute (ATI) has been actively recruiting for positions such as **Senior Project Officer for Digital Agribusiness and Rural Finance**.<sup>35</sup> This role requires a deep understanding of the digital financial inclusion landscape and experience in developing and launching digital financial products tailored for the agricultural sector. The objective is to create jobs for youth by fostering digital agribusiness startups and MSMEs, signaling a strategic push to integrate technology and finance into the rural economy.<sup>35</sup> The demand for these elite specialists underscores a critical feature of the agricultural labor market: a modernization agenda driven by a small but highly influential group of experts.

### 3.4. Compensation and Livelihoods

The economic reality for the vast majority of Ethiopia's agricultural workforce is stark and presents a formidable development challenge. While the sector is the largest employer, compensation levels are among the lowest in the country, reflecting the low productivity and subsistence nature of much of the work.

Broad salary survey data provides a top-level view of this reality. One 2025 analysis estimated the average monthly salary for workers in the agricultural sector to be approximately 5,780 Ethiopian Birr (ETB), which is equivalent to roughly \$105 USD at current exchange rates.<sup>36</sup> This figure, while an aggregate, positions agricultural labor near the bottom of the national earnings scale.

More granular, field-level research paints an even more concerning picture of the livelihood crisis facing smallholder farmers. A detailed study of farm households in three woredas of the Southern Ethiopia Regional State conducted a living income gap analysis, comparing the actual income of farmers to the benchmark required for a decent standard of living.<sup>37</sup> The findings were alarming. The actual daily income per adult equivalent was found to be as low as 60.3 ETB (\$1.16) in Gumer woreda and 88.8 ETB (\$1.71) in Hawassa Zuria woreda. This level of income means that farmers' actual earnings cover only between 19% and 27% of what is needed for a decent life. The study concluded that a massive living income gap exists across all study areas, with the gap being as high as 81% in Gumer.<sup>37</sup>

This evidence highlights a fundamental productivity-income nexus. The low incomes are a direct result of low productivity, which is in turn caused by a range of factors including small landholdings, reliance on rain-fed agriculture, and limited access to modern inputs and markets.<sup>3</sup> While interventions like the AGP have shown some success in raising yields and incomes for participants<sup>5</sup>, these benefits have not yet reached a scale sufficient to close the profound income gap for the majority. This demonstrates that improving the livelihoods of the agricultural workforce is not merely a matter of social welfare but is intrinsically linked to the core technical challenge of transforming agricultural productivity across the nation.

The structure of the agricultural labor market reveals a critical vulnerability: a "missing middle" in its skills profile. At the base of the pyramid is the vast workforce of low-skill smallholder farmers. At the apex, there is a small but growing demand for elite

specialists—agronomists with PhDs, data scientists, and policy experts—who are hired by government agencies, NGOs, and large firms to design and manage modernization programs.<sup>32</sup> The crucial link between these two poles, however, is underdeveloped. This "missing middle" consists of the mid-level technical and managerial workforce—the cooperative managers, the lead farmers, and particularly the agricultural extension agents—who are responsible for translating expert advice into widespread on-farm practice.

The model employed by the Sasakawa Africa Association, which explicitly focuses on training these "Development Agents" (DAs), acknowledges the centrality of this cadre.<sup>30</sup> However, the persistently low levels of productivity and income across the sector suggest that this vital link in the chain remains weak.<sup>4</sup> Extension agents are often under-resourced, responsible for vast areas, and may lack the continuous training needed to keep pace with new technologies and practices. Therefore, the most significant bottleneck preventing the scaling of agricultural best practices is the capacity of this intermediary workforce. Any national workforce development strategy for agriculture must prioritize the professionalization of this "missing middle," investing in their training, equipping them with modern tools (including digital extension platforms), and ensuring they are adequately compensated to be effective agents of change.

**Table 3.1: Profile of Agricultural Job Vacancies - Required Qualifications, Skills, and Employers (2024-2025)**

Job Title	Employer (Type)	Required Education	Key Technical Skills	Key Soft Skills	Location (Region/City)	Salary (if available)
<b>Agronomist</b>	Private Firm (KMD Farm) <sup>32</sup>	MSc/BSc in Plant Science, General Agriculture	Soil science, Crop science, Pest management, GIS, GPS tracking	Teamwork, Communication	Gambela	Negotiable
<b>Agronomist</b>	NGO (Farm)	MSc/BSc in	Climate-Smart	Training, Project	Addis Ababa	GBP 1228 / Month



	Africa) <sup>33</sup>	Agronomy , Plant Sciences	Agriculture (CSA), Crop modeling (CropWat, AquaCrop ), Small-scale irrigation	monitoring, Stakeholder engagement		
<b>Agriculture Specialist</b>	Foreign Gov. (U.S. Embassy) <sup>34</sup>	Bachelor's in Agricultural Economics, Policy, Trade	Agricultural economics, Trade policy analysis, Statistical data analysis	Report writing, Time management, Inter-agency communication	Addis Ababa	\$21,803 - \$26,638 / Year
<b>Digital Agribusiness &amp; Rural Finance Officer</b>	Gov. Institute (ATI) <sup>35</sup>	Master's degree	Digital agriculture, Rural financial inclusion, Agribusiness development, MSME support	Project management, Partner coordination, Coaching	Oromia, Amhara, Tigray, Hawassa	Competitive
<b>Program Officer - Gender</b>	NGO (AGRA) <sup>39</sup>	Degree in Agricultural Studies, Social Science	Gender analysis in agriculture, Program support	Communication, Coordination	Addis Ababa	Not specified
<b>Senior Project Officer - Safeguarding</b>	Gov. Institute (ATA) <sup>40</sup>	Not specified	Environmental & Social Safeguarding, Gender	Project management	Tigray Region	Not specified

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*Note: This table synthesizes data from actual job vacancies posted in 2024 and 2025, providing concrete evidence of the skills demanded by the modernizing agricultural sector.*

## Section 4: The Livestock Value Chain: Employment and Specialization

### 4.1. Employment Structure and Economic Contribution

The livestock sector is a cornerstone of Ethiopia's Bronze Economy, serving as a significant source of employment, income, and cultural wealth. The sector's economic footprint is substantial, contributing an estimated 19% to the overall national GDP and accounting for 16-19% of foreign exchange earnings.<sup>8</sup> In terms of employment, its role is even more profound. The livestock sector provides jobs for over 30% of the entire agricultural labor force, making it a primary livelihood source for millions of Ethiopians.<sup>8</sup> The employment structure within this sector is diverse, ranging from traditional, extensive pastoralist systems that have existed for centuries to emerging, intensive commercial operations focused on specific value chains. This diversity presents both opportunities for growth and complex challenges for workforce development and policy formulation.

### 4.2. Focus on Value Chain Development

In recent years, there has been a discernible strategic shift in how development partners and the government approach the livestock sector. The focus is moving away from simply increasing animal headcounts towards a more sophisticated strategy of developing integrated and market-oriented value chains. This approach aims to create more value, reduce post-harvest losses, and generate a wider array of

employment opportunities.

A prime example of this strategy is the USAID-funded "Feed the Future Ethiopia Transforming Agriculture" project. This initiative explicitly targets the development of specific livestock value chains, with a particular focus on dairy, poultry, and small ruminants (sheep and goats).<sup>16</sup> The project's activities are designed to strengthen the entire system, from input supply to final consumption. This includes supporting the domestic livestock feed industry, providing technical assistance to private sector investors, and strengthening milk collection centers and processors.<sup>16</sup>

This strategic focus on value chains is creating new and specialized job roles that did not exist in the traditional livestock economy. Job advertisements for the "Transforming Agriculture" project and similar initiatives frequently seek professionals for positions such as **Livestock Market Systems Manager** and **Livestock Specialist**.<sup>16</sup> The responsibilities of these roles go far beyond animal husbandry; they involve market analysis, business development, facilitating linkages between producers and processors, and overseeing the implementation of activities that increase the availability, desirability, and convenience of animal-source foods.<sup>41</sup> This indicates a deliberate effort to build a more commercial, resilient, and professionalized livestock sector, creating demand for a new class of skilled managers and technical experts.

#### 4.3. The Role of Specialized Human Capital

The modernization and commercialization of the livestock sector are critically dependent on a strong foundation of specialized human capital and robust professional institutions. Ethiopia is fortunate to host several key organizations that contribute to this foundation.

The **International Livestock Research Institute (ILRI)**, co-hosted in Addis Ababa, is a world-leading CGIAR research center dedicated to livestock in developing countries.<sup>43</sup> ILRI's presence in Ethiopia provides a direct pipeline of cutting-edge research, scientific expertise, and development solutions that can inform national policy and practice. The institute is an active employer of both national and international experts, with roles ranging from research scientists to program officers focused on areas like gender integration in livestock systems.<sup>43</sup>

Complementing the research capacity of ILRI is the professional leadership of the **Ethiopian Veterinary Association (EVA)**. Established in 1974, the EVA is a pioneer professional association with nearly 2000 members, representing the vast majority of veterinarians and many animal scientists in the country.<sup>45</sup> The EVA plays a crucial role in promoting and strengthening the veterinary profession, upholding ethical standards, and safeguarding the rights of veterinarians. Through its annual conferences, publications like the Ethiopian Veterinary Journal, and various development projects (such as HEARD - Health of Ethiopian Animals for Rural Development), the EVA serves as a vital platform for knowledge sharing, continuous professional development, and policy advocacy.<sup>45</sup>

The demand for professionals with formal qualifications is clearly reflected in the job market. Vacancies for roles like Livestock Specialist and Senior Livestock Market System Manager consistently require degrees in animal and veterinary sciences, livestock management, or agricultural development, combined with several years of relevant experience in value chain development and working with smallholder producers.<sup>16</sup> This underscores that the future growth of the livestock sector is inextricably linked to the nation's ability to produce and retain a skilled workforce capable of managing complex, market-driven systems.

The strategic pivot towards developing integrated livestock *value chains* represents a powerful engine for job creation, offering a more diverse and higher-skilled range of employment opportunities compared to primary crop production. A subsistence livestock holder represents a single, often low-productivity, job role. In contrast, a commercial dairy value chain, as targeted by projects like "Transforming Agriculture"<sup>16</sup>, creates a whole spectrum of interconnected jobs. This includes on-farm roles for specialized forage growers and dairy producers, as well as a host of off-farm positions: feed processors, milk collectors, chilling plant technicians, dairy processing factory workers, quality control specialists, packaging experts, logistics and transport personnel, and marketing and sales professionals.

The very creation of job titles like "Livestock Market Systems Manager"<sup>42</sup> signifies the emergence of a new professional class whose purpose is to orchestrate these complex chains. Their work involves facilitating business linkages, improving market access, and ensuring the smooth flow of products and information from producer to consumer. This demonstrates that policy and investment directed at supporting value chain integration are not merely agricultural policies; they are direct and highly effective job creation strategies. Public and private investments in critical "job

multiplier" infrastructure—such as cold chain logistics, processing facilities, reliable energy for chilling centers, and market information systems—are essential for building a more resilient, diversified, and prosperous rural economy with opportunities that extend far beyond the farm gate.

## **Section 5: The Forestry Sector: Tapping the Green Job Potential**

### **5.1. Scale of Employment: The Documented and Undocumented**

The forestry sector in Ethiopia is a colossal source of employment, yet its full contribution remains one of the most significant yet poorly quantified aspects of the national labor market. The formal statistics often fail to capture the sheer scale of dependency on forest resources for livelihoods across the country. While older data from the 1980s indicated that forest industry employment accounted for a mere 2.2% of the total workforce <sup>47</sup>, more recent and holistic analyses suggest a vastly different picture.

A 2020 report by the World Resources Institute provides a striking estimate: approximately 57 million people, which constitutes more than half of Ethiopia's population, are engaged in full- or part-time work within the forestry sector.<sup>9</sup> This includes an estimated 11 million rural households who rely almost exclusively on forests for their sustenance. This massive workforce operates across a spectrum of arrangements.

At one end is the formal, documented sector. This includes employment in state-owned commercial forestry enterprises, such as the Oromia Forest and Wildlife Enterprise and the Amhara Forest Enterprise. These entities are significant economic actors, generating annual revenues of \$10.5 million and \$4.5 million, respectively, and creating formal jobs in plantation management and timber harvesting.<sup>9</sup>

At the other, much larger end of the spectrum is the vast informal workforce. For millions, forestry-related activities are a primary source of income, even if they are not formally recognized or recorded. These activities include the collection and sale

of firewood and the production of charcoal, which together are by far the largest employment generators within the sector.<sup>47</sup> Additionally, the collection and trade of non-timber forest products (NTFPs) like gum arabic, frankincense, honey, and beeswax provide crucial income streams for rural communities.<sup>9</sup> The sheer number of people engaged in these activities underscores the sector's role as a vital, albeit often invisible, component of the rural economy.

## 5.2. Government Job Creation Initiatives

The Government of Ethiopia has explicitly recognized the immense potential of the forestry sector for creating green jobs and has launched several large-scale initiatives to this end. These programs aim to harness the country's labor force to restore degraded landscapes while simultaneously creating sustainable livelihoods.

The **National Forest Sector Development Program (NFSDP)** is a cornerstone of this strategy. The program includes ambitious targets to create 630,000 full-time rural jobs through activities such as managing tree nurseries, planting seedlings, protecting existing forests, and marketing forest products.<sup>9</sup> This program aligns with the country's broader climate and development goals, as articulated in the Climate Resilient Green Growth (CRGE) Strategy, which envisions restoring Ethiopia's forest cover to 30%.<sup>9</sup>

Perhaps the most visible of these initiatives is the **Green Legacy campaign**. Launched by the Prime Minister, this ambitious national program has mobilized millions of citizens from all walks of life to participate in mass tree planting events, with a reported 9 billion trees planted since 2019.<sup>9</sup> While much of this labor is voluntary, the campaign has created seasonal employment and has significantly raised the profile of reforestation and environmental stewardship.

To support these goals with a professional workforce, government bodies like **Ethiopian Forestry Development (EFD)** are actively recruiting skilled personnel. A recent vacancy announcement from EFD sought to hire "Coordinators" for project sites in Afar, Oromia, and Amhara regions.<sup>48</sup> The role of these coordinators is to implement projects focused on the sustainable marketing of timber, NTFPs (such as honey and gum), and tree seedlings, directly linking conservation efforts with economic development and job creation at the local level.<sup>48</sup>

### 5.3. Enterprise-Led Employment and Skill Needs

Beyond government programs, a dynamic ecosystem of private and cooperative enterprises is emerging as a significant driver of employment in the forestry sector. These businesses are demonstrating that sustainable forest management and restoration can be profitable, creating green jobs and developing sustainable value chains.

The bamboo sub-sector is a prime example. Thousands of farmers in Ethiopia cultivate bamboo, and companies are now creating the processing facilities needed to turn this raw material into a steady source of income.<sup>9</sup> One such company, engaged in building bamboo furniture, generates an average annual revenue of \$2.8 million, employs 300 people directly in its factories, and sources its raw bamboo from hundreds of individual farmers and cooperatives.<sup>9</sup> Another initiative, the "From Forest to Future" project, aims to scale up bamboo agroforestry practices with the goal of creating tens of thousands of jobs across the value chain, including in harvesting, transportation, biochar production, and processing.<sup>49</sup>

Similarly, the honey value chain is a major source of employment. Apinec Agro-Industry, based in the Kaffa zone, produces and processes honey for both export and domestic markets, supplying major clients like Ethiopian Airlines.<sup>9</sup> The company directly employs 27 people and has provided training and improved beehives to hundreds of farmers, creating a network that supports thousands of livelihoods.<sup>9</sup>

This shift towards enterprise-led development is also changing the skill profile of the forestry workforce. While manual labor for planting and harvesting remains essential, there is a growing demand for managerial, technical, and marketing skills. The job advertisements for the EFD "Coordinator" positions, for instance, require a Bachelor's or Master's degree in fields like Forest Economics, Agricultural Economics, or Project Planning and Management.<sup>48</sup> This reflects a need for professionals who can develop marketing strategies, conduct market assessments, organize producer cooperatives, and manage complex projects that integrate ecological and economic objectives.

The forestry sector in Ethiopia uniquely functions as both a massive, informal social safety net and a nascent, powerful engine for formal green enterprise. On one hand, millions of people, particularly the rural poor, depend on informal and often



unsustainable extraction of forest resources like firewood for their daily survival.<sup>9</sup> This makes the sector a de facto safety net of last resort. Any aggressive conservation policy that abruptly restricts access to these resources without providing viable alternatives risks plunging these vulnerable populations into deeper poverty.

On the other hand, the success of enterprise-led models in high-value products like bamboo and honey demonstrates a clear pathway to formal, sustainable, and more lucrative employment.<sup>9</sup> The core policy challenge, therefore, is to manage a "just transition" that bridges these two realities. This requires moving employment from low-value, unsustainable extraction (e.g., deforestation for charcoal) to high-value, sustainable management and processing. The key to achieving this is to design commercial forestry and landscape restoration programs, such as those being implemented by the EFD <sup>48</sup>, with an explicit "Community Employment and Enterprise" component. Such a component would proactively include and upskill the very communities currently engaged in informal activities. This involves providing them with training in modern nursery management, sustainable harvesting techniques, and NTFP processing, as well as facilitating access to finance and markets to help them establish their own small enterprises or cooperatives. The "Coordinator" role <sup>48</sup> becomes pivotal in this context, acting as the crucial link between government strategy, private investment, and community transition into the formal green economy.

**Table 5.1: Estimated Employment in the Forestry Value Chain by Sub-sector and Arrangement**

Sub-sector	Estimated Employment (Full-time/Part-time)	Predominant Employment Arrangement	Key Skills Required
<b>Commercial Plantations / State Forest Management</b>	Formal jobs (e.g., Oromia & Amhara Forest Enterprises) <sup>9</sup>	Formal Salaried, Casual Labor	Forest management, Plantation supervision, Technical forestry skills, Manual labor
<b>Agroforestry (e.g., Bamboo)</b>	Tens of thousands of potential jobs <sup>49</sup>	Cooperative Member, Self-Employed Out-grower, Enterprise Employee	Bamboo cultivation, Harvesting techniques, Agroforestry management,

			Processing skills
<b>NTFPs - Honey &amp; Beeswax</b>	Thousands of jobs (e.g., Apinec Agro-Industry) <sup>9</sup>	Cooperative Member, Self-Employed Beekeeper, Enterprise Employee	Modern beekeeping, Honey processing, Quality control, Marketing
<b>NTFPs - Gums &amp; Resins</b>	Significant, but poorly documented <sup>47</sup>	Informal Self-Employed, Seasonal Collector	Tapping techniques, Grading, Local market knowledge
<b>Wood Fuel / Charcoal</b>	Largest employment generator, millions involved <sup>47</sup>	Informal Self-Employed, Casual Labor	Manual labor (cutting, carrying), Charcoal production techniques
<b>Nursery &amp; Reforestation</b>	630,000 targeted full-time jobs (NFSDP) <sup>9</sup>	Government Program Participant, Cooperative Member, Casual Labor	Seedling production, Planting techniques, Site management

*Note: This table provides a structured overview of the diverse employment landscape within forestry, highlighting the contrast between formal, enterprise-led employment and the vast informal sector.*

## **Section 6: The Mining Sector: A Tale of Two Workforces**

### **6.1. Artisanal and Small-Scale Mining (ASM): The Informal Giant**

The Artisanal and Small-Scale Mining (ASM) sub-sector is a dominant feature of Ethiopia's mining landscape, functioning as a massive, informal economic giant. It is a critical source of livelihood for a significant portion of the rural population, directly employing an estimated 1.2 to 1.3 million people.<sup>11</sup> The indirect economic impact is even larger, with the sector supporting the livelihoods of an estimated 7.5 million

individuals who depend on the income it generates.<sup>10</sup> ASM is also a major contributor to the national economy, accounting for approximately 65% of Ethiopia's foreign exchange earnings from minerals, particularly gold.<sup>10</sup>

The demographic profile of the ASM workforce is distinct. It is composed predominantly of young men, with the majority of miners falling between the peak productive ages of 18 and 45.<sup>10</sup> This makes ASM an important, if precarious, source of employment for Ethiopia's youth, especially in rural areas with few alternative income opportunities. Educational attainment within this workforce is generally low, with one study finding that 78% of individual miners had a maximum of 8 years of schooling.<sup>11</sup> While women have historically participated in ASM, their involvement is reportedly diminishing rapidly. This decline is attributed to the depletion of easily accessible surface-level placer mineral deposits, which requires more physically demanding and remote mining operations, creating barriers for female participation.<sup>10</sup>

The defining characteristic of the ASM sector is its overwhelming informality. Despite the existence of a licensing process, it is estimated that a staggering 94% of active artisanal miners are unlicensed.<sup>10</sup> They operate using rudimentary tools and labor-intensive techniques, with little to no access to modern technology, geological data, or capital.<sup>11</sup> This informality results in a precarious existence for the miners. Their income is highly variable and often low, with one EITI report estimating the average annual labor income for an individual miner to be between 8,000 and 10,000 ETB.<sup>14</sup> This informality also leads to significant revenue loss for the government, as only a fraction of owed royalties are ever collected.<sup>10</sup>

## **6.2. Large-Scale Mining (LSM): The Formal Enclave**

In stark contrast to the sprawling informality of ASM, the formal Large-Scale Mining (LSM) sector operates as a capital-intensive, technologically advanced, and highly regulated enclave. While its current direct employment footprint is much smaller than that of ASM, it is a priority area for government-led growth and is the target for major foreign investment.<sup>1</sup> The employment profile of the LSM sector is fundamentally different, demanding a workforce with high-level technical and managerial expertise.

An examination of job postings from LSM companies operating or developing projects in Ethiopia, such as **Kurmuk Gold Mine Plc** (a subsidiary of Allied Gold Corp) and

**Ethiopotash B.V.**, reveals the specific skill sets required. These companies are not seeking manual laborers on public job boards; they are recruiting a cadre of elite professionals to manage complex, multi-million-dollar operations according to international standards.

Vacancies for roles like **Mining Sector Manager**, **Environment Manager**, and other senior engineering and geology positions consistently require advanced academic qualifications, typically a Master of Science (MSc) degree in fields like Mining Engineering, Geology, or Environmental Science.<sup>51</sup> Furthermore, these roles demand extensive professional experience, often a minimum of 10 years in the field with at least 5-6 years in a managerial capacity.<sup>52</sup> The focus of these positions is on strategic planning, operational efficiency, financial management, and, critically, ensuring compliance with rigorous environmental and social governance (ESG) standards, such as the Responsible Gold Mining Principles of the World Gold Council.<sup>51</sup> Companies like Ethiopotash explicitly brand their employment opportunities as being part of a "sustainable future in potash mining," emphasizing innovation, environmental stewardship, and cutting-edge technology.<sup>53</sup> This highlights the sector's need for a workforce that is not only technically proficient but also well-versed in the principles of modern, responsible resource extraction.

### **6.3. The Local Content and Linkage Failure**

Despite the government's ambition to transform the mining sector into a main pillar of the economy, with a target of increasing its contribution to GDP from 2% to 10% by 2025<sup>2</sup>, a fundamental structural weakness threatens to undermine this goal: the profound failure to create meaningful linkages between the mining sector and the broader Ethiopian economy.

A landmark 2021 report by the African Development Bank (AfDB), titled "Towards the Development of a Local Content Policy Framework for Ethiopia's Mining Sector," provides a damning assessment of this situation.<sup>2</sup> The study, conducted at the request of the Ethiopian government, found that the country has not sufficiently harnessed its rich mineral deposits to national advantage. A key reason for this is the weakness of "local content"—the use of locally sourced goods, services, and labor in mining operations.

The report identifies several critical barriers. First, it points to a weak and uncoordinated policy environment. The draft mineral resources development policy and existing mining proclamations were found to lack specific, enforceable provisions to enhance local content.<sup>2</sup> This is compounded by poor coordination between government ministries and agencies, creating confusion and uncertainty for investors regarding local content requirements.

Second, and most critically for this report, the AfDB study highlights a severe human capital deficit. There is a consensus among industry stakeholders that Ethiopia's education and training institutions are not producing "fit for work" graduates for the mining sector. This is attributed to the absence of relevant, practical courses and a poor linkage between industry, government, and academia, resulting in a workforce that is technically unprepared for the demands of modern mining.<sup>2</sup>

Finally, the report notes weak inter-sectoral linkages. The domestic manufacturing sector has a low capacity to supply the inputs needed by the mining industry, leading to a high reliance on imports.<sup>2</sup> This combination of policy gaps, skills deficits, and weak industrial linkages means that the mining sector, particularly LSM, risks remaining an isolated economic enclave, generating revenue from exports but failing to create the significant multiplier effects in terms of jobs and domestic enterprise development that are essential for broad-based national growth.

The employment landscape of Ethiopia's mining sector is defined by two disconnected worlds operating in parallel. The ASM sub-sector provides a low-tech, low-income, and precarious livelihood for over a million people, while the LSM sub-sector imports high-level expertise to run sophisticated, capital-intensive operations.<sup>11</sup> There is currently no effective bridge between these two universes. The skills, capital, and legal status of the ASM workforce prevent them from participating in or benefiting from the growth of LSM, while the domestic education system fails to produce the skilled technicians and managers that LSM operations require.<sup>2</sup>

This disconnect is the single greatest barrier to realizing the government's vision for the sector. The true economic potential of mining is unlocked not just through the export of raw minerals, but through the development of local content—creating skilled local jobs, fostering a domestic supply chain of goods and services, and adding value through local processing. The current model, where LSM remains an isolated enclave and ASM remains an informal, under-supported activity, cannot achieve this.

Therefore, the most critical policy imperative is to create pathways for formalization and skills development that can bridge this gap. A national mining strategy must pursue a dual-track approach. On one track, it must continue to attract and facilitate LSM investment. On the other, it must simultaneously implement a robust, well-funded national program to formalize, train, and equip the vast ASM workforce. This could involve creating decentralized service hubs for ASM cooperatives that provide access to geological data, training in more efficient and safer mining techniques, equipment rental schemes, and access to capital. It should also involve mandating that LSM investors develop and implement structured apprenticeship programs for local youth and supplier development programs for local businesses. By building a bridge between these two worlds, Ethiopia can begin to transform its mineral wealth into shared prosperity and sustainable employment.

**Table 6.1: Comparative Analysis of ASM and LSM Employment Characteristics**

Characteristic	Artisanal & Small-Scale Mining (ASM)	Large-Scale Mining (LSM)
<b>Estimated Workforce Size</b>	>1.2 million direct; 7.5 million livelihoods <sup>10</sup>	Low direct employment; high capital intensity
<b>Demographics (Age, Gender)</b>	Predominantly young (18-45), male; declining female participation <sup>10</sup>	Diverse; includes local and expatriate professionals
<b>Education Level</b>	Low; majority with primary education or less <sup>11</sup>	High; requires BSc/MSc in technical fields <sup>51</sup>
<b>Employment Arrangement</b>	Overwhelmingly informal (94% unlicensed), self-employed, seasonal <sup>10</sup>	Formal salaried contracts, permanent positions
<b>Key Skills</b>	Manual labor, rudimentary techniques, local knowledge <sup>50</sup>	Engineering, Geology, Environmental science, Project management, Financial management, ESG compliance <sup>51</sup>
<b>Average Income/Salary</b>	Low and precarious (est. 8,000-10,000 ETB/year) <sup>14</sup>	High, competitive international salaries for senior roles

<b>Primary Policy Challenge</b>	Formalization, safety, environmental management, access to capital & technology <sup>10</sup>	Local content development, skills gap, infrastructure, regulatory predictability <sup>2</sup>
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*Note: This table starkly illustrates the "two worlds" of mining employment in Ethiopia, providing a basis for designing targeted and distinct policy interventions for each sub-sector.*

## Part III: Human Capital, Workforce Development, and Policy Synthesis

### Section 7: The National Skills Pipeline: Gaps and Opportunities

#### 7.1. Supply of Skilled Labor

Ethiopia possesses a substantial higher education infrastructure with the theoretical capacity to supply the skilled labor required by the modernizing Bronze Economy. A network of national universities offers a wide and relevant array of undergraduate and postgraduate degree programs. **Mekelle University**, for example, provides a comprehensive list of Master of Science programs directly applicable to the primary sectors, including Dryland Agroforestry, Soil Science, Sustainable Watershed Management, Horticulture, Agronomy, Animal Breeding and Genetics, and numerous specializations in geology such as Economic Geology and Mining Geology.<sup>54</sup>

Similarly, **Wachemo University's** College of Agricultural Sciences, established with the strategic mission to align with national agricultural development policy, offers eight undergraduate (BSc) programs and ten Master's programs.<sup>55</sup> These cover fields



like Plant Science, Animal Science, Agricultural Economics, Natural Resource Management, and Agroforestry. The college also hosts a PhD program in Soil Science, indicating a capacity for producing top-tier researchers and academics.<sup>55</sup> These institutions, and others like them across the country, represent a significant national asset and the primary source for the high-level human capital needed to fill the professional and managerial roles identified in the sectoral analyses. The existence of these programs demonstrates that, on paper, the supply pipeline for graduates with relevant qualifications is in place.

## 7.2. The Pervasive Skills Mismatch

Despite the considerable output of graduates from these institutions, a recurring and critical theme across multiple independent assessments is the existence of a profound skills mismatch between what the education system produces and what the labor market demands. This gap is arguably the single greatest constraint on the development of a productive and competitive workforce in the Bronze Economy.

The 2021 AfDB report on local content in the mining sector is particularly trenchant in its critique. It reports a clear consensus among industry stakeholders that Ethiopia's education and training facilities are simply not producing "fit for work" graduates.<sup>2</sup> The reasons cited are systemic: poor linkages between industry and academia, outdated curricula that lack practical relevance, and a lack of investment in modern laboratory and workshop facilities. The result is a cohort of graduates who may hold the correct degree but lack the practical, hands-on skills required by a modern mining or agribusiness enterprise.

This challenge is not confined to the mining sector. The broader issue of youth unemployment is directly linked to this skills gap. Organizations like **Dereja** were established specifically to tackle the problem of fresh graduates lacking the necessary experience and job-readiness skills to be competitive in the labor market.<sup>18</sup> Dereja's mission—to provide career guidance, employability skills training, and connections to employers—is a market-based response to a systemic failure in the formal education pipeline. This mismatch forces employers in high-skill sectors into a difficult choice: either invest heavily in remedial, on-the-job training for local graduates, which adds significant cost and time, or hire more expensive expatriate

professionals who already possess the required practical experience. This dynamic fundamentally undermines the goal of building a self-sufficient, skilled national workforce.

### 7.3. The Rise of Digital and Agritech Skills

Compounding the existing challenge of the practical skills gap is the emergence of a new and rapidly growing demand for digital and technology-related competencies. The future of the Bronze Economy, particularly in agriculture, will be increasingly data-driven and technology-enabled. The Government of Ethiopia has recognized this trend and is taking steps to embrace it. In January 2024, the **Ministry of Agriculture launched a national agricultural digitalization strategy**, aimed at improving data-driven decision-making and modernizing farming practices through the integration of digital tools.<sup>25</sup>

This strategic push is reflected in the evolving demands of the labor market. The **Ethiopian Agricultural Transformation Institute (ATI)** is at the forefront of this shift, actively creating and recruiting for roles like "Digital Agribusiness and Rural Finance Officer".<sup>35</sup> These positions require a hybrid skill set combining knowledge of agriculture with expertise in digital financial services, entrepreneurship, and startup ecosystems. Online job platforms are also adapting to this new reality.

**GeezJobs**, for instance, now includes "Agritech" as a specific, searchable job category, indicating that a critical mass of such jobs is beginning to form.<sup>56</sup> This signals a future where proficiency in digital tools, data analysis, geographic information systems (GIS), and other technology-driven solutions will be not just an advantage, but a core requirement for many professional roles in the agricultural sector. This adds another complex layer to the national skills gap, as the education system must now race to develop curricula that can produce graduates fluent in these new technologies.

The persistent gap between the qualifications of graduates and the needs of employers suggests a systemic issue within Ethiopia's human capital development framework. The system appears to be overly focused on the production of academic credentials (degrees and diplomas) rather than on the cultivation of practical, industry-relevant competencies. This results in a workforce that is "paper-qualified

but practically-unskilled," which is the fundamental cause of the skills mismatch lamented by employers.<sup>2</sup>

The evidence for this is clear. Universities are producing a significant number of graduates with degree titles that, on the surface, align perfectly with the needs of the Bronze Economy.<sup>54</sup> Yet, employers, particularly in technical fields like mining and commercial agriculture, consistently find these graduates are not ready for the workplace and require extensive further training.<sup>2</sup> The very existence of market-based bridging initiatives like Dereja (for fresh graduates) and the data-driven graduate tracking services of HahuJobs are commercial responses to this systemic inefficiency.<sup>18</sup> They exist to fill the chasm between the worlds of education and employment.

The solution, therefore, is not necessarily to build more universities or enroll more students, but to undertake a fundamental reform of the educational and training paradigm. This requires a strategic shift away from a purely degree-centric model towards a competency-based model. In such a system, the specific skills and competencies required by industry would be the starting point for curriculum design. This would necessitate the creation of formal, institutionalized partnerships between universities, TVETs, and private sector employers. Curricula would be co-designed, and practical experience—through mandatory, well-structured, and supervised internships, apprenticeships, and co-op programs—would be treated as an integral component of the learning process, not as an optional afterthought. The detailed recommendations in the AfDB's report on mining local content strongly support this conclusion, advocating for needs-based training programs and mandatory industrial training appraisals.<sup>2</sup> This is the only path to producing graduates who can seamlessly transition from the classroom to a productive role in the economy.

**Table 7.1: Alignment of Higher Education Output with Bronze Economy Skill Demands**

Sector	Key In-Demand Roles (from Job Ads)	Required Competencies (Technical & Soft)	Relevant University Programs <sup>54</sup>	Identified Gaps in Graduate Preparedness <sup>2</sup>
<b>Agriculture</b>	Agronomist, Digital Agribusiness	Climate-Smart Agriculture, Crop Modeling	BSc/MSc in Agronomy, Soil Science,	Lack of practical field experience; insufficient

	Officer <sup>32</sup>	Software, Digital Finance, Project Management	Agricultural Economics	training on modern agricultural software and digital tools.
<b>Livestock</b>	Livestock Market Systems Manager, Veterinary Specialist <sup>42</sup>	Value Chain Analysis, Business Development, Animal Health Management, Epidemiology	BSc/MSc in Animal Science, Veterinary Medicine, Agribusiness	Gap between theoretical knowledge and practical management of commercial livestock operations.
<b>Forestry</b>	Forest Economics Coordinator, Restoration Project Manager <sup>9</sup>	Forest Economics, Sustainable Marketing, Project Management, Community Engagement	BSc/MSc in Agroforestry, Natural Resource Management	Insufficient focus on the business and marketing aspects of forestry; need for stronger project management skills.
<b>Mining (LSM)</b>	Mining Engineer, Geologist, Environment Manager <sup>51</sup>	Mine Planning Software, Geological Mapping, ESG Compliance, Financial Modeling	BSc/MSc in Mining Geology, Engineering Geology, Environmental Geoscience	Severe gap in practical skills; lack of exposure to modern mining technologies and international standards; "unfit for work" graduates.

*Note: This table synthesizes demand-side data from job vacancies with supply-side data from university programs and qualitative assessments of the skills gap, providing a clear, evidence-based rationale for targeted educational reform.*

## Section 8: Strategic Recommendations for Policy and Planning

The comprehensive mapping of Ethiopia's Bronze Economy employment landscape reveals a series of deep structural challenges and significant opportunities. The following strategic recommendations are designed to address these findings directly, providing a clear, hierarchical, and actionable framework for national workforce development, sector-specific planning, and overarching policy formulation.

### 8.1. For National Workforce Development

**110. Recommendation 1: Establish a National Bronze Economy Skills Council.**

To address the pervasive skills mismatch, it is imperative to create a permanent, high-level council co-chaired by the Ministries of Labor and Social Affairs, Education, Agriculture, and Mines and Petroleum. This council must have mandatory, empowered representation from private sector industry associations, professional bodies (such as the Ethiopian Veterinary Association <sup>45</sup>), and key employers from each sub-sector. The council's core mandate would be to institutionalize the linkage between education and industry, providing a formal mechanism for the continuous review and alignment of university and TVET curricula with the real-time, evolving needs of the labor market.

**111. Recommendation 2: Overhaul the TVET System for the "Missing Middle".**

The analysis identified a critical "missing middle" of mid-level technicians and managers. A flagship national initiative should be launched to reform and elevate the TVET system to fill this gap. The initiative must focus on creating specialized, high-quality programs for Bronze Economy trades, such as agricultural machinery maintenance, mineral processing technicians, certified nursery managers, and lapidary (gemstone cutting) skills. Success depends on moving beyond traditional classroom instruction. Curricula must be co-designed and co-delivered with industry partners, and mandatory, supervised apprenticeship programs must be integrated as a core component of certification, ensuring graduates possess the practical skills employers require.<sup>2</sup>

**112. Recommendation 3: Scale a National Labor Market Information System (LMIS).**

Effective workforce planning is impossible without reliable data. The government should build upon the innovative model of HahuJobs <sup>23</sup> to develop

and scale a comprehensive national LMIS. A strategic plan and dedicated resources should be allocated to expand its biometric registration and structured data collection approach beyond the current focus on industrial parks and universities. The system should be progressively rolled out to capture data from the core organizational units of the Bronze Economy, such as agricultural cooperatives, forestry associations, and newly formalized ASM groups, thereby making the vast informal workforce visible to policymakers for the first time.

## 8.2. For Sector-Specific Planning

113. **Recommendation 4 (Agriculture & Livestock): Focus on Value Chain Job Creation.** To maximize employment generation, sector planning and investment priorities should shift from a primary focus on raw production to targeted development of entire value chains. This entails strategic public investment in "job multiplier" infrastructure, such as cold storage facilities, agro-processing zones, and farm-to-market roads. Concurrently, a robust set of incentives should be created to attract private investment into value-adding activities like food processing, packaging, and marketing. This approach will create a wider spectrum of more stable and higher-skilled off-farm rural jobs, as seen in the design of modern livestock projects.<sup>16</sup>
114. **Recommendation 5 (Forestry): Implement a "Just Transition" for Forest-Dependent Communities.** The forestry sector's dual role as an economic engine and a social safety net requires a carefully managed transition. All future commercial forestry, conservation, and landscape restoration programs<sup>9</sup> must be designed with an explicit and funded "Community Employment and Enterprise" component. This component would provide targeted training, access to finance, and market linkages to help transition individuals and communities currently engaged in informal, unsustainable activities (e.g., charcoal production) into formal, sustainable roles in tree nurseries, forest management, eco-tourism, and the processing of high-value NTFPs like honey and bamboo.<sup>9</sup>
115. **Recommendation 6 (Mining): Launch a National ASM Formalization and Up-skilling Program.** To bridge the chasm between the ASM and LSM sectors, a comprehensive national program must be launched to provide a clear, accessible, and beneficial pathway to formalization for artisanal miners. This program should go beyond simple licensing and address the core challenges

identified in the analysis.<sup>2</sup> Key components must include: establishing decentralized service hubs that provide access to geological data and maps; offering extensive training in more efficient, safer, and environmentally sound mining and processing techniques; facilitating access to capital and equipment rental schemes; and establishing transparent, fair-trade buying centers to break the hold of exploitative middlemen.

### 8.3. For National Policy Formulation

**116. Recommendation 7: Develop and Legislate a National Local Content**

**Policy.** Leveraging the comprehensive framework and findings of the 2021 AfDB report <sup>2</sup>, the government should prioritize the development and passage of a binding National Local Content Act. This legislation must apply to all large-scale foreign and domestic investments in the Bronze Economy, with a particular initial focus on the mining and petroleum sectors. The policy must include clear, measurable, and ambitious targets for the employment of local labor at all skill levels, procurement of goods and services from local suppliers, and mandatory investment by companies in domestic skills development and technology transfer programs. The law must be backed by a clear monitoring and evaluation framework and a schedule of incentives for compliance and penalties for non-compliance.

**117. Recommendation 8: Harmonize Federal-Regional Governance of Natural**

**Resources.** The analysis revealed significant policy and regulatory incongruence between federal ministries and regional state bureaus, particularly in the governance of mining and land.<sup>2</sup> This creates uncertainty and risk for investors and impedes the smooth implementation of projects. A high-level inter-governmental task force should be established to harmonize these regulations and create a clear, predictable, and stable "one-window" investment climate that encourages the long-term, job-creating investments the country needs.

**118. Recommendation 9: Link National Wage Policy to Productivity and Shared**

**Prosperity.** The current development model contains a tension between the desire to attract investment through low wages <sup>36</sup> and the national goal of achieving middle-income status and improving livelihoods for citizens.<sup>4</sup> A sustainable path forward requires a new policy paradigm. The national wage policy should be explicitly linked to productivity growth. This means moving away



from a strategy based on wage suppression and towards one that focuses on creating a high-skill, high-productivity, and high-wage economy. This requires coordinated public investment in the very factors that enable productivity gains—the skills of the workforce, the adoption of modern technology, and the development of quality infrastructure. This is the only sustainable pathway to achieving the nation's ambitious development goals and ensuring that economic growth translates into shared prosperity for all Ethiopians.

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# **Ethiopia's Gold Economy: A Comprehensive National Assessment of the Financial Services Employment Landscape**

## **Executive Summary: The State of Ethiopia's Gold Economy Workforce**

Ethiopia's financial sector, the "Gold Economy," is undergoing a profound and rapid transformation, establishing itself as a primary engine of formal, high-value employment and a critical enabler of national development. This report presents a comprehensive, nationwide assessment of the sector's employment landscape, systematically mapping work opportunities across banking, insurance, microfinance, capital markets, and the burgeoning financial technology (fintech) domain. The analysis reveals a dynamic and dualistic market characterized by a technologically advanced, high-skill core concentrated in Addis Ababa and a geographically dispersed, operationally-focused network driving financial inclusion across the country.

A dominant trend across all sub-sectors is the drive towards formalization, where even emerging fintech roles are defined by structured requirements for education and experience, signaling a maturation of the industry. The primary channels for talent acquisition are consolidated within a few national online job platforms, indicating an opportunity for financial institutions to enhance their direct recruitment and branding strategies.

However, this rapid growth has exposed significant skills gaps that pose a strategic risk to the sector's future. There is a critical deficit of professionals in actuarial science, a foundational discipline for a robust insurance market. Similarly, the fintech revolution is creating urgent demand for a new class of hybrid professionals who possess a sophisticated blend of financial acumen, technological expertise, and

business strategy—a talent profile the current educational ecosystem is not yet equipped to produce at scale. Other acute shortages are evident in senior cybersecurity, data science, and roles requiring dual mastery of International Financial Reporting Standards (IFRS) and Ethiopia's complex local regulatory environment.

The employment landscape is also marked by a significant geographic bifurcation. Strategic, innovative, and high-compensation roles are overwhelmingly concentrated in the capital, Addis Ababa, while regional employment is dominated by operational and service delivery positions. This structure limits career progression for professionals outside the capital and concentrates the sector's most dynamic economic benefits in a single metropolitan area.

To address these challenges and capitalize on the sector's immense potential, this report puts forth a series of strategic recommendations for key stakeholders. For educational institutions, this includes modernizing curricula to integrate practical, in-demand skills and launching specialized graduate programs in areas of critical shortage like actuarial science and fintech. For policymakers, we recommend the formulation of a national financial workforce development strategy, the formalization of key professional certifications, and the creation of incentives for regional talent development. For the industry itself, we advocate for strategic investment in internal upskilling, the modernization of recruitment practices, and deeper collaboration with universities to co-create a sustainable talent pipeline. By addressing these structural gaps, Ethiopia can ensure its Gold Economy not only grows but also fosters a skilled, resilient, and geographically inclusive workforce capable of driving the nation's economic future.

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## **Section I: The Macro-Landscape of Financial Sector Employment in Ethiopia**

### **1.1. Overview of the Gold Economy**



The Ethiopian financial sector is a cornerstone of the nation's economic development strategy, serving as a critical intermediary for capital allocation, risk management, and payment systems. Its role extends beyond pure economics; it is a primary generator of formal, high-value employment, creating stable career paths for a growing professional class. The institutional landscape is diverse, anchored by state-owned giants such as the Commercial Bank of Ethiopia (CBE) and the Development Bank of Ethiopia (DBE), which have historically played a pivotal role in the nation's industrial and infrastructural projects.<sup>1</sup> These public institutions command a significant footprint in terms of assets, branch networks, and employee numbers, offering a wide array of roles from trainee programs to highly specialized engineering and management positions.<sup>1</sup>

Complementing the state-owned institutions is a vibrant and expanding private sector. This includes a multitude of commercial banks like Awash Bank, Dashen Bank, and Bank of Abyssinia, each competing aggressively for market share and talent.<sup>5</sup> The insurance sector, while smaller, is also a key component, with companies such as Awash Insurance, Nile Insurance, and the state-owned Ethiopian Insurance Corporation (EIC) providing essential risk mitigation services and employment opportunities.<sup>8</sup> The ecosystem is further broadened by a dynamic microfinance sector, featuring institutions like Dynamic MFI and Liyu Microfinance, which are crucial for extending financial services to underserved populations in both urban and rural areas, thereby supporting the national agenda for financial inclusion.<sup>11</sup> Together, these institutions form the bedrock of Ethiopia's "Gold Economy," an ecosystem poised for significant growth and evolution.

## **1.2. The Recruitment Ecosystem**

The process of connecting talent with opportunity in Ethiopia's financial sector is heavily mediated by a small number of dominant online platforms. National employment portals such as EthioJobs, HahuJobs, and GeezJobs have become the de facto marketplaces for financial services recruitment.<sup>14</sup> These platforms host a high volume of vacancies spanning all sub-sectors and experience levels, from entry-level

Trainee Banker positions to executive roles like Chief Finance Officer.<sup>16</sup> Their



comprehensive listings, which cover both English and Amharic postings, make them an indispensable primary source for any analysis of the formal labor market. For instance, a single search on these platforms can yield opportunities from commercial banks, insurance firms, microfinance institutions (MFIs), and emerging fintech companies, demonstrating their central role in the ecosystem.<sup>18</sup>

This reliance on third-party aggregators reveals a notable market characteristic: the underutilization of direct institutional career channels. A systematic review of the corporate websites of several major financial players, including the Ethiopian Insurance Corporation, Nile Insurance Company, and Goh Betoch Bank, frequently shows static pages with "no active vacancies" or outdated information.<sup>10</sup> This discrepancy suggests that while these institutions are actively hiring—as evidenced by their presence on aggregator sites—they are not leveraging their primary corporate asset, their own website, as an effective tool for building a direct talent pipeline. This market structure has several implications. It increases reliance on (and likely payments to) intermediaries for recruitment. It also represents a missed opportunity for institutions to control their own employer branding and communicate directly with potential applicants.

Beyond these primary channels, specialized recruitment occurs through the networks of development partners and non-governmental organizations (NGOs). Institutions like the World Bank and the African Development Bank (AfDB) recruit for high-level finance and development roles through their own international portals, often seeking professionals with specific expertise in areas like private sector development in fragile contexts or digital development.<sup>23</sup> Similarly, NGOs like CARE International post unique roles that blend financial expertise with community development objectives, such as the

Financial Services Officer position focused on building financial literacy among vulnerable populations.<sup>26</sup> These channels cater to a different segment of the market, often requiring a blend of financial skills and development sector experience.

### **1.3. The Spectrum of Employment Arrangements**

The employment landscape within Ethiopia's financial sector is dominated by formal, structured arrangements, reflecting a strong trend towards professionalization and

formalization across the industry. The overwhelming majority of job postings are for permanent, full-time positions, which offer stability, benefits, and clear career progression. This is the standard model for core roles within established banks and insurance companies, from Customer Service Officer to Branch Manager.<sup>5</sup>

However, the sector also accommodates a range of other employment modalities. Fixed-term contracts are common, particularly within the context of donor-funded development projects. For example, the Partners Finance Coordinator role at Imagine 1 Day is offered on a six-month contract with the possibility of extension, a typical arrangement for project-based work within the NGO sector.<sup>28</sup>

Consultancy arrangements represent another important facet of the employment spectrum, catering to the need for specialized, project-based expertise. An Insurance Broker role, for instance, may be structured as a consultancy, allowing an organization to leverage expert market knowledge for a specific task like securing employee health and life insurance without adding a permanent headcount.<sup>29</sup> This model provides flexibility for both the organization and the expert professional.

Critically, the sector provides structured entry points for new talent through a variety of internship and trainee programs. These are vital for building the future workforce and bridging the gap between academic knowledge and practical industry skills. Major institutions like the Commercial Bank of Ethiopia and Global Bank Ethiopia actively recruit for positions such as Trainee Banker, Legal Trainee, and Management Trainee.<sup>4</sup> These programs typically target recent graduates with strong academic records but zero-to-minimal work experience, offering them a formal pathway into the financial industry.

An important observation is that even the more flexible or temporary forms of work in the sector are highly structured. The concept of an informal "gig economy" of undocumented, casual labor appears to be minimal within the professional tiers of the financial industry. Instead, non-permanent work is formalized through contracts and consultancy agreements with clearly defined responsibilities, qualifications, and deliverables.<sup>29</sup> This overarching trend of formalization is a positive indicator for workforce development, as it creates a transparent market with clear skill requirements that can be effectively targeted by educational programs and policy initiatives.

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## Section II: Deep Dive: Sub-Sector Employment Ecosystems

A granular analysis of Ethiopia's financial services landscape reveals distinct employment ecosystems within each sub-sector. While interconnected, each area—from the foundational banking sector to the nascent capital markets—possesses a unique structure of roles, skill requirements, and career pathways. Understanding these individual ecosystems is essential for targeted workforce development.

### 2.1. The Banking Sector: The Bedrock of Financial Employment

The banking sector remains the largest and most established employer within Ethiopia's Gold Economy. Its employment structure can be broadly categorized into commercial and retail banking, which forms the vast, geographically dispersed base, and the more specialized corporate and investment banking functions concentrated in the capital.

#### 2.1.1. Commercial and Retail Banking

This sub-sector is the public face of the banking industry and the primary source of employment opportunities, particularly outside of Addis Ababa. The roles are organized in a clear hierarchy, from frontline operations to branch leadership.

**Entry-Level and Operational Roles:** The most accessible entry points into the banking sector are operational roles that require a Diploma or, more commonly, a Bachelor's degree with little to no prior experience. The Trainee Banker position, offered by institutions like Global Bank Ethiopia and Shabelle Bank, is a quintessential example, designed to induct recent graduates into the fundamentals of banking.<sup>17</sup> Other foundational roles include the

Customer Service Officer (CSO), responsible for handling client interactions and transactions; the Cashier, managing daily cash operations; and the Junior Banker,

who supports various branch functions.<sup>12</sup> These positions are the lifeblood of the branch network, ensuring the day-to-day delivery of banking services across the country.

**Credit and Lending Functions:** A step up in specialization involves roles dedicated to the bank's core business of lending. The Loan Officer is a key position, responsible for loan origination, client assessment, and portfolio management, often involving direct field visits and customer relationship management.<sup>34</sup> Supporting this function is the

Credit Analyst, a more technical role focused on in-depth financial analysis, risk assessment, and appraisal of loan applications to ensure compliance with the bank's policies.<sup>6</sup> Positions like the

Banking Business Officer often combine sales, service, and basic credit functions, acting as a versatile resource within the branch.<sup>20</sup> These roles typically require a BA degree in a business-related field and a few years of relevant experience.

**Branch Leadership and Management:** At the apex of the retail banking structure is the branch leadership team. The Branch Manager is a pivotal role, responsible for the overall performance of the branch, including sales, operations, profitability, compliance, and team management.<sup>38</sup> The seniority and responsibility of this role are often tiered, as seen in Awash Bank's classification of

Branch Manager roles from Class IV (smaller, regional branches) to Class I (larger, more strategic branches), with experience requirements ranging from eight to over eleven years.<sup>5</sup> These managers are the key drivers of business growth and service excellence in their respective communities, requiring a deep understanding of the local market and strong leadership capabilities.

### 2.1.2. Corporate and Investment Banking

Concentrated almost exclusively within the headquarters of major banks in Addis Ababa, these roles are more specialized, senior, and cater to the needs of large corporations, government entities, and institutional clients.

**Relationship and Portfolio Management:** The Senior Corporate Business Officer is

a prime example of a role in this domain, focused on managing and growing a portfolio of high-value corporate clients.<sup>6</sup> A key area of growth is in Interest-Free Banking (IFB), with specific roles like

Senior Corporate Business Officer - IFB emerging to serve this market segment.<sup>6</sup> Similarly,

Relationship Manager - SME Banking positions focus on providing specialized financial solutions to small and medium enterprises, a critical sector for Ethiopia's economy.<sup>42</sup>

**Specialized and Treasury Functions:** This category includes roles in trade finance, project finance, and treasury management. While specific job titles like Trade Finance Officer were not frequently observed in the data scan, the function is a core part of corporate banking services offered by all major banks. The existence of the Development Bank of Ethiopia points to a structured demand for Project Finance Analyst roles to support large-scale infrastructure and development initiatives.<sup>2</sup> More visible in the data are treasury roles, such as the

Senior Treasury Officer, responsible for managing the bank's liquidity, investments, and financial risk.<sup>43</sup> These positions demand a high level of analytical skill and market knowledge.

## 2.2. The Insurance Sector: A Landscape of Risk and Opportunity

Ethiopia's insurance sector, while developing, presents a distinct set of employment opportunities focused on risk assessment, claims management, and product distribution. The sector's growth is creating demand for both operational staff and highly specialized technical experts.

**Core Operations:** The functional backbone of any insurance company is composed of several key roles. The Underwriting Officer is responsible for evaluating risks, determining policy terms, and calculating premiums for various insurance products (life, non-life, medical).<sup>44</sup> The

Claims Officer manages the process of handling and settling claims, ensuring that valid claims are paid accurately and efficiently.<sup>46</sup> A more generalist role, the

Insurance Officer, often combines aspects of underwriting, claims handling, and customer service.<sup>45</sup> These positions typically require a Bachelor's degree and between two to five years of direct experience in insurance operations.

**Sales and Distribution:** A crucial channel for the insurance market is its network of intermediaries. The Insurance Broker role, as exemplified by a consultancy position sought by JSI, acts as a liaison between clients and insurance providers.<sup>29</sup> This role requires strong market analysis, negotiation, and client advisory skills to secure the best possible coverage and terms. The fact that this role can be offered on a remote, consultancy basis indicates a degree of flexibility in the sector's employment arrangements.<sup>29</sup>

**Specialized Technical Roles and a Critical Skills Deficit:** The most significant finding within the insurance sector is the profound gap in high-level analytical talent, specifically in actuarial science. A healthy and innovative insurance market depends on actuaries for sophisticated risk pricing, product development, financial modeling, and reserving. However, a comprehensive scan of the job market reveals a near-total absence of vacancies for experienced actuaries.<sup>49</sup> The sole relevant posting identified was for an

Actuary trainee at Ethiopian Reinsurance Share Company, the national reinsurer.<sup>50</sup> This position explicitly targets recent graduates with high GPAs but requires no prior experience, indicating that the institution is forced to build this critical talent from the ground up. This is not merely a skills gap; it is a structural vulnerability that limits the sector's ability to innovate, manage risk effectively, and compete on a global scale. It highlights an urgent need for the development of specialized actuarial science programs within Ethiopian universities to create a sustainable domestic talent pool.

### **2.3. Microfinance and Financial Inclusion: Reaching the Last Mile**

The microfinance and financial inclusion sub-sector is characterized by its dual mission of financial sustainability and social impact. This duality is reflected in its employment structure, which includes both traditional financial roles within MFIs and specialized programmatic roles within the development sector.

**Operational Roles within Microfinance Institutions (MFIs):** MFIs like Dynamic,

Liyu, and Kebronhill operate with a structure that mirrors commercial banks but is adapted to their specific client base.<sup>11</sup> Key roles include the MFI

Branch Manager, who oversees branch operations and drives growth in a specific locality; the Customer Service Officer, who manages client relationships and transactions; the Loan Officer, who is often a field-based role involving client outreach, credit assessment for micro-enterprises, and loan recovery; and the Accountant, who handles the branch's financial records.<sup>12</sup> These roles are fundamental to delivering financial services to underbanked populations across urban and rural Ethiopia.

**The Development Sector-Finance Nexus:** A unique feature of this sub-sector is the significant role played by international NGOs and development partners in driving the financial inclusion agenda. This creates a distinct career path that combines financial expertise with development program management. The Financial Services Officer position at CARE International is a prime example.<sup>26</sup> The responsibilities of this role are not direct lending but rather focus on capacity building, such as training Village Savings and Loan Association (VESA) members, delivering financial literacy programs, and facilitating public-private partnerships to develop "pro-poor financial products." Similarly, roles like the

Partners Finance Coordinator within NGOs involve overseeing the financial management and compliance of local partner organizations, building their capacity, and managing donor funds effectively.<sup>28</sup> This symbiotic relationship between MFIs and the development sector offers professionals two different but interconnected pathways to contribute to financial inclusion: an operational track focused on direct service delivery and a programmatic track focused on ecosystem building, policy, and technical assistance.

## **2.4. The Nascent Capital Market: Building from the Ground Up**

The recent establishment of the Ethiopian Securities Exchange (ESX) and its regulatory counterpart, the Ethiopian Capital Market Authority (ECMA), marks the dawn of a new era for Ethiopia's financial sector.<sup>52</sup> This development is creating a new ecosystem of highly specialized employment opportunities that did not previously exist.



**Exchange and Regulatory Roles:** The foundational build-out of the market infrastructure is generating demand for a new class of regulatory and operational professionals. Job postings from the ESX itself, for positions such as Listing and Reporting, Sr. Manager, Sr. Manager: Surveillance and Investigation, and Marketing Sr. Analyst, clearly illustrate this trend.<sup>52</sup> These roles are responsible for creating the rules, systems, and procedures that will govern the market, from overseeing company listings to monitoring trading activity for irregularities. These are high-stakes, high-skill positions that form the very core of the new capital market.

**Market Participant Roles:** As the market infrastructure becomes operational, demand will surge for professionals within market participant firms. The licensing of new investment banks, such as CBE Capital and Wegagen Capital, is a leading indicator of this future demand.<sup>54</sup> These firms will need to recruit

Equity Research Analysts to evaluate securities, Brokerage Support staff to facilitate trades, and Portfolio Management Assistants to help manage investment funds. Precursors to these more complex roles are already visible in the market. For example, the Share Administration Officer position, seen at institutions like Goh Betoch Bank and Digaf Microcredit, is responsible for managing shareholder records and transactions.<sup>20</sup> This function will evolve into more sophisticated investor relations and corporate actions roles as companies become publicly listed and must comply with exchange regulations.

## **2.5. Professional and Advisory Services: The Support Ecosystem**

The growth and increasing complexity of the financial sector are supported by a mature ecosystem of professional and advisory services, creating a wide range of employment opportunities in accounting, audit, law, and training.

**Accounting and Audit Services:** This is a well-established and critical support function. The demand spans the entire hierarchy of accounting and audit roles. At the operational level, companies across all sub-sectors require Accountants to manage their day-to-day financial transactions and reporting.<sup>55</sup> A crucial function for ensuring corporate governance and internal control is the

Internal Auditor, who assesses operational and financial risks and ensures compliance

with company policies.<sup>19</sup> At the most senior level, positions like

Finance Advisor and Chief Finance Officer (CFO) are responsible for providing strategic financial guidance to executive leadership.<sup>16</sup> A key requirement for these senior roles is expertise in International Financial Reporting Standards (IFRS), reflecting the country's move towards global accounting standards.<sup>18</sup> The presence and influence of major international and local accounting firms, such as Grant Thornton and TAY Authorized Accounts, further underscore the professionalization of this field.<sup>59</sup>

**Legal and Compliance Services:** The highly regulated nature of the financial industry necessitates significant legal and compliance support. Banks and other financial institutions employ legal professionals in roles such as District Legal Attorney, who handles court cases and provides legal opinions at the regional level, and Senior Legal Compliance Officer, a headquarters-based role focused on ensuring the institution adheres to all relevant laws and regulations, particularly the directives issued by the National Bank of Ethiopia.<sup>6</sup>

**Training and Capacity Development:** The rapid evolution of the financial sector creates a continuous need for workforce training and development. This need is met by professional associations that play a vital role in capacity building. The Ethiopian Bankers Association (EBA) serves as a lobbying agent and training institute for the banking sector, while the Association of Ethiopian Microfinance Institutions (AEMFI) performs a similar function for the MFI sector.<sup>63</sup> AEMFI's public tenders for the development and revision of training modules for MFI professionals are a clear indicator of the structured employment opportunities available in financial education and curriculum development.<sup>65</sup> These roles are essential for upskilling the existing workforce and preparing new entrants for the demands of a modernizing financial industry.

The following table provides a consolidated overview of the employment landscape, mapping representative job titles across the different sub-sectors and employment arrangements.

**Table 1: Distribution of Financial Sector Roles by Sub-Sector and Employment Type**

Sub-Sector	Role Category	Representative Job Titles	Employment Type	Experience Level
<b>Banking</b>	Branch Operations	Trainee Banker, Customer Service Officer, Cashier	Permanent	Entry (0-2 yrs)
	Credit & Lending	Loan Officer, Credit Analyst, Banking Business Officer	Permanent	Mid-Level (2-5 yrs)
	Branch Management	Branch Manager (Class I-IV)	Permanent	Senior (6-11+ yrs)
	Corporate Banking	Senior Corporate Business Officer (IFB), Relationship Manager	Permanent	Senior (5-8+ yrs)
<b>Insurance</b>	Core Operations	Underwriting Officer, Claims Officer, Insurance Officer	Permanent	Mid-Level (2-5 yrs)
	Sales/Distribution	Insurance Broker	Consultancy, Remote	Mid-Level (3-5+ yrs)
	Technical/Analytical	Actuary (Trainee)	Permanent	Entry (0 yrs)
<b>Microfinance</b>	Branch Operations	MFI Branch Manager, Loan Officer (Field)	Permanent	Mid-Level (3-5 yrs)
	NGO/Development	Financial Services Officer, Partners Finance Coordinator	Contract, Project-Based	Mid-Level (3-5+ yrs)

<b>Capital Markets</b>	Exchange/Regulatory	Sr. Manager: Surveillance, Listing & Reporting Analyst	Permanent	Senior (5-8+ yrs)
	Corporate	Share Administration Officer	Permanent	Mid-Level (1-3 yrs)
<b>Fintech</b>	Executive	Chief Technology Officer (CTO)	Permanent, Executive	Executive (8-12+ yrs)
	Platform Management	Director, Intelligent Finance as a Service	Permanent, Executive	Executive (12+ yrs)
<b>Professional Services</b>	Accounting/Audit	Accountant, Internal Auditor	Permanent	Mid-Level (2-5 yrs)
	Executive Finance	Chief Finance Officer (CFO), Finance Advisor	Permanent, Executive	Executive (12-14+ yrs)
	Legal/Compliance	District Legal Attorney, Senior Compliance Officer	Permanent	Senior (4-6+ yrs)

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### Section III: The Anatomy of a Financial Professional: Skills, Qualifications, and Career Trajectories

The modern Ethiopian financial professional is shaped by a combination of formal education, specialized certifications, and a blend of technical and professional competencies. An analysis of job requirements across the sector reveals a clear and structured hierarchy of qualifications that define career entry and advancement.

### 3.1. Foundational Educational Requirements

The educational qualifications demanded by the financial sector are stratified according to the complexity and responsibility of the role.

177. **Diploma/Level IV:** For many entry-level administrative and operational support roles, a technical and vocational education and training (TVET) qualification is the baseline. Positions such as Store Clerk in a bank's district office or a Cashier in a microfinance institution often require a Diploma or Level IV certificate in a relevant field like procurement or accounting.<sup>6</sup>
178. **Bachelor's Degree (BA/BSc):** The Bachelor's degree is the standard and most common educational requirement for entry into the professional ranks of the financial sector. It is the minimum qualification for nearly all core roles, from a Trainee Banker position targeting recent graduates to a mid-career Branch Manager role.<sup>5</sup> The most frequently required fields of study are business-related, including Accounting, Finance, Economics, Management, and Business Administration.
179. **Master's Degree (MA/MSc):** A postgraduate degree serves as a significant advantage and is often a requirement for senior, strategic, and specialized positions. For example, the Commercial Bank of Ethiopia's highly competitive Management Trainee program requires an M.A. degree in fields like Economics or Management.<sup>4</sup> Similarly, director-level positions, such as Director, Risk Management at Wegagen Bank, explicitly list a Master's degree as a primary qualification, with experience requirements adjusted based on whether the candidate holds a Master's or a Bachelor's.<sup>67</sup> This indicates that a Master's degree can accelerate career progression and is essential for reaching the highest echelons of management.

### 3.2. The High-Value Currency of Professional Certifications

Beyond formal academic degrees, professional certifications have emerged as a critical currency in the financial labor market. They serve as a signal of specialized expertise, a commitment to professional development, and are often a prerequisite for senior and technical roles.

180. **Accounting and Finance Certifications:** For senior finance and accounting positions, internationally recognized certifications are highly valued. The job requirements for a Finance Advisor or a Chief Finance Officer frequently list ACCA (Association of Chartered Certified Accountants) or CPA (Certified Public Accountant) as preferred or favorable qualifications.<sup>16</sup> Furthermore, specific expertise in International Financial Reporting Standards (IFRS) is a recurring demand, with some roles requiring "certification or proven expertise" in IFRS implementation, reflecting the standard's importance in modern financial reporting.<sup>18</sup>
181. **Project and IT Management Certifications:** In the technology and project management domains, certifications are a key differentiator. The Project Management Professional (PMP) certification from the Project Management Institute (PMI) is "highly recommended" for leadership roles in complex technical projects, such as the Data Center Lead Architect at CBE.<sup>3</sup> For IT service management roles, an ITIL (Information Technology Infrastructure Library) certification is considered a significant advantage.<sup>6</sup>
182. **Niche Technical Certifications:** For highly specialized technical roles, specific industry certifications are often mandatory. The data center engineering positions at CBE, for instance, require candidates to hold expert-level certifications from The Uptime Institute, such as "Accredited Tier Specialist (ATS)" or "Accredited Tier Designer (ATD)".<sup>3</sup> In the insurance sector, while the talent pool is nascent, professional qualification or certification in actuarial science is noted as a preferable attribute for an Actuary trainee, signaling the future importance of such credentials.<sup>50</sup>

### 3.3. In-Demand Technical Skills

The day-to-day effectiveness of a financial professional is determined by their mastery of a set of core technical skills, or "hard skills." These vary by function but reveal a clear picture of what employers value.

183. **Core Financial Skills:** The ability to perform rigorous financial analysis and build financial models is fundamental for roles like Financial Analyst.<sup>68</sup> A deep understanding of risk assessment methodologies is crucial for risk management and underwriting functions.<sup>20</sup> Expertise in credit analysis is the bedrock of all

lending-related positions.<sup>35</sup> A pervasive requirement across nearly all senior finance and compliance roles is a comprehensive knowledge of Ethiopian tax laws and the specific directives issued by the National Bank of Ethiopia (NBE), which govern the sector's operations.<sup>18</sup>

184. **Software and Systems Proficiency:** Practical skills in using relevant software are non-negotiable. This includes proficiency in standard accounting software like Peachtree and QuickBooks, as well as enterprise resource planning (ERP) systems such as SAP or Oracle.<sup>18</sup> For banking professionals, familiarity with the institution's core banking system, with Temenos being a specifically mentioned example, is essential for operational roles.<sup>33</sup>
185. **Digital and Technology Skills:** As the sector digitizes, a new set of technical skills is becoming paramount. In the realm of cybersecurity, professionals are expected to have knowledge of international security frameworks like PCI-DSS (for payment cards), ISO27001, and the NIST Cybersecurity Framework.<sup>70</sup> For the emerging data science roles, proficiency in programming languages such as Python or R is a baseline requirement.<sup>71</sup> In fintech development, skills in API (Application Programming Interface) management and integration are critical for connecting different financial platforms and services.<sup>31</sup>

### 3.4. Essential Professional Competencies (Soft Skills)

While technical skills determine what a professional *can do*, professional competencies, or "soft skills," often determine how effectively they do it and how far they advance. These competencies are universally demanded across all sub-sectors and seniority levels.

186. **Leadership and Team Management:** The ability to lead, motivate, and manage a team is explicitly required for all managerial positions, from a microfinance Branch Manager to a Finance Advisor in a large corporation.<sup>18</sup> Job descriptions for leaders often include detailed expectations regarding fostering teamwork, developing staff, and resolving conflicts.<sup>57</sup>
187. **Communication and Interpersonal Skills:** Effective communication, both written and verbal, is a constant refrain in job postings. This skill is critical for client-facing roles, for presenting complex financial information to stakeholders, and for collaborating within and across teams.<sup>26</sup>



188. **Analytical and Problem-Solving Skills:** The capacity to analyze complex situations, identify problems, and develop effective solutions is highly valued. This is a core requirement for roles ranging from an Insurance Officer handling complex claims to a Financial Analyst interpreting market data.<sup>47</sup>
189. **Client Relationship Management:** For any role that involves sales or client service, from a Branch Relationship Officer to a Senior Corporate Business Officer, the ability to build and maintain strong, trust-based relationships with clients is paramount to success.<sup>6</sup>

A defining feature of the senior financial professional in Ethiopia is the mandatory requirement to possess dual expertise in both global standards and local regulations. An examination of senior-level job postings reveals that it is insufficient to be proficient in only one domain. For example, a Finance Advisor must have proven expertise in International Financial Reporting Standards (IFRS) while simultaneously demonstrating deep knowledge of Ethiopian tax laws and financial regulations.<sup>18</sup> Similarly, a

Chief Finance Officer needs a comprehensive understanding of international reporting standards alongside local compliance requirements.<sup>16</sup> This dual mandate creates a high barrier to entry for purely internationally or purely locally trained professionals and places a significant premium on the limited talent pool that can effectively navigate both worlds. This has direct implications for educational and training programs, which must move beyond teaching generic IFRS principles to integrating them with the specific context of Ethiopia's legal and regulatory framework.

The following table deconstructs the capabilities required for several high-demand roles, mapping them to the specific technical skills, professional competencies, and certifications valued by employers.

**Table 2: High-Demand Technical and Professional Skills Matrix**

Key Role	Technical Skills	Professional Competencies	Required/Preferred Certifications
<b>Credit Analyst</b>	Financial Statement Analysis, Credit Scoring, Risk	Analytical Thinking, Attention to Detail, Ethical Decision-	BA in Accounting/Finance

	Assessment, Knowledge of NBE Directives	Making, Communication	
<b>Internal Auditor</b>	Risk-Based Auditing, IFRS, Internal Controls, Knowledge of IIA Standards	Integrity, Analytical Skills, Communication, Problem-Solving	BA/MA in Accounting, ACCA/CPA (preferred)
<b>Digital Banking Manager</b>	Digital Product Knowledge, IT Project Management, Data Analysis, Channel Management	Strategic Thinking, Leadership, Customer Focus, Adaptability	MA/BA in Business/IT, PMP/ITIL (advantageous)
<b>Cybersecurity Officer</b>	Security Frameworks (NIST, ISO27001), Vulnerability Testing, Firewall Management, Incident Response	Problem-Solving, Attention to Detail, Planning & Organizing, Collaboration	BSc in CompSci/IT, CISA/CISSP (advantageous)
<b>Senior Finance Executive (CFO/Advisor)</b>	IFRS Implementation, Ethiopian Tax Law, Financial Modeling, Budgeting & Forecasting, ERP Systems	Leadership, Strategic Guidance, Communication, Negotiation, Integrity	MA/BA in Finance/Accounting, ACCA/CPA (required/preferred)
<b>Fintech Product/Platform Manager</b>	AI/ML Concepts, API Management, Digital Lending Platforms, Insurtech, Agile Methodologies	Visionary Leadership, P&L Management, Partner Relationship Management, Innovation	MA/BA in Tech/Business (Hybrid)

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## Section IV: Geographic and Structural Dimensions of Work

The employment landscape of Ethiopia's financial sector is characterized by a stark geographic imbalance. The distribution of jobs reveals a highly concentrated, strategic hub in the capital, supported by a widespread network of operational and

service-delivery roles throughout the nation's regional cities and rural areas. This structure has profound implications for talent mobility, career progression, and equitable economic development.

#### **4.1. The Addis Ababa Financial Hub**

Addis Ababa stands as the undisputed nerve center of Ethiopia's Gold Economy. An analysis of job location data from across the sector confirms that the headquarters of virtually all significant financial institutions are based in the capital. This includes major state-owned and private banks like the Commercial Bank of Ethiopia, Awash Bank, and Dashen Bank; leading insurance companies; the full spectrum of emerging fintech firms like Addispay and Kifiya; the new capital market institutions (NBE, ECMA, ESX); and the top-tier professional services firms such as Grant Thornton and TAY Authorized Accounts.<sup>1</sup>

This concentration of corporate headquarters means that the most senior, strategic, specialized, and innovative roles are almost exclusively located in Addis Ababa. Opportunities for executive leadership, such as Chief Finance Officer or Chief Technology Officer, are found here.<sup>16</sup> Highly specialized technical roles that require unique infrastructure or expertise, like

Data Center Lead Architect or Senior System Administrator, are based in the capital's corporate offices.<sup>3</sup> Furthermore, the forward-looking roles that are shaping the future of the industry—such as

Director, Intelligent Finance as a Service at a fintech platform or Sr. Manager: Surveillance and Investigation at the securities exchange—are also concentrated in Addis Ababa.<sup>52</sup> This creates a powerful gravitational pull for top-tier talent, making the city the primary market for high-skill, high-compensation financial careers.

#### **4.2. Regional and Rural Networks: The Arteries of Financial Access**

Outside the capital, the financial employment landscape is defined by the extensive

branch networks of banks and microfinance institutions, which act as the primary arteries for delivering financial services to the broader population. These networks are the main source of formal financial sector employment in Ethiopia's regional economic centers.

**Regional Cities:** Job postings consistently show vacancies for branch-level staff in major regional cities such as Dire Dawa, Hawassa, Mekelle, Bahir Dar, Jimma, Assela, and Nejo.<sup>1</sup> The typical roles available in these locations are operational and sales-focused, including

Branch Manager, Customer Service Manager, Banking Business Officer, and Credit Analyst.<sup>6</sup> These positions are essential for regional economic activity, supporting local businesses and individuals with access to credit, savings, and payment services.

**Rural and Community Services:** In more remote and rural areas, microfinance institutions are the key employers and drivers of financial inclusion. MFI roles like Branch Manager in the Oromia region or the field-based Loan Officer are designed to serve agricultural communities, small-scale entrepreneurs, and other underserved populations.<sup>34</sup> This "last-mile" delivery of financial services is also supported by a less formalized but critical layer of mobile banking agents and community-based financial educators, who extend the reach of the formal financial system into areas with limited physical branch infrastructure.

This analysis reveals a clear pattern: the labor market is not just concentrated, it is qualitatively bifurcated. Plotting job titles against their locations demonstrates a functional split. Addis Ababa is the exclusive hub for roles that *define strategy, design products, and build systems*—such as Chief Technology Officer, Data Center Architect, and Director, Intelligent Finance. In contrast, the rest of the country is primarily a market for roles that *execute strategy and deliver services*, such as Branch Manager and Customer Service Officer. This geographic bifurcation has significant consequences. It can create a "brain drain" towards the capital, as ambitious professionals must relocate to access senior and specialized roles. It also limits the career progression pathways for talented individuals based in regional areas, potentially capping their advancement at the level of branch or district management. From a policy perspective, this structure concentrates the highest-value economic activity of the financial sector in one city, posing a challenge for equitable national development. Addressing this imbalance may require strategic policy interventions, such as incentivizing the decentralization of certain headquarters' back-office or

support functions, or establishing regional centers of excellence to distribute high-skill employment opportunities more evenly across the country.

4.3. The Rise of Remote and Digital Work

While the vast majority of financial sector jobs in Ethiopia remain tied to a physical location—be it a corporate headquarters or a local branch—a nascent but important trend towards remote and hybrid work is emerging. This shift is enabled by improving digital infrastructure and is concentrated in roles that are inherently more portable and less dependent on in-person interaction.

The data provides clear examples of this evolution. An Insurance Broker position, which relies on market analysis and communication, is explicitly advertised as a "Remote" role.<sup>29</sup> A

Loan Officer position at a micro-credit provider is listed as "Hybrid," suggesting a mix of office-based work and remote field activities.<sup>34</sup> These examples, though not widespread, signal a growing acceptance of flexible work arrangements, particularly for roles in sales, advisory, and field operations.

The potential for remote work is most significant in technology-enabled functions. Roles such as data analysis, software development, compliance monitoring, and certain types of customer support can be performed effectively from any location with a reliable internet connection. As these functions become more central to the financial industry's operations, the number of remote and hybrid opportunities is likely to increase, potentially offering a partial solution to the geographic concentration of high-skill jobs.

Table 3: Geographic Concentration of Financial Employment Opportunities

Geographic Location	Role Category	Representative Job Titles
Addis Ababa (Financial Hub)	Executive & Strategic	Chief Executive Officer (CEO), Chief Finance Officer (CFO), Chief Technology Officer (CTO), Director (Risk, Audit,

		Finance)
	<b>Specialized &amp; Technical</b>	Data Center Lead Architect, Senior System Administrator, Sr. Manager (Surveillance, Listing), Data Scientist, Legal Counsel
	<b>Corporate &amp; HQ Operations</b>	Senior Corporate Business Officer, Senior Treasury Officer, Product Development Specialist, HR Business Partner
<b>Major Regional Cities</b> (e.g., Dire Dawa, Hawassa, Jimma, Bahir Dar, Nekemte)	<b>Branch &amp; District Management</b>	Branch Manager (Class I-IV), Customer Service Manager, District Credit Analyst, District Legal Attorney
	<b>Branch Operations &amp; Sales</b>	Banking Business Officer, Customer Service Officer, Branch Accountant, Branch Relationship Officer, Senior Cashier
<b>Rural &amp; Field Locations</b> (e.g., Oromia Region, Limmu Genet, Bambasi)	<b>Microfinance &amp; Inclusion</b>	MFI Branch Manager, Loan Officer (Field-based), Customer Service Officer (MFI)
	<b>Entry-Level Banking</b>	Junior Banker, Cashier
<b>Location Independent</b>	<b>Remote/Hybrid Roles</b>	Insurance Broker (Remote), Loan Officer (Hybrid), Financial Analyst (Trading - Remote Potential)

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## Section V: The Digital Frontier: Technology's Impact on Financial Roles

Technology is no longer an ancillary support function in Ethiopia's financial sector; it is a core driver of strategy, product innovation, and competitive advantage. The digital frontier is rapidly expanding, creating entirely new categories of employment, infusing traditional roles with new skill requirements, and fundamentally reshaping the anatomy of the financial professional.

### **5.1. Fintech and Digital Banking: The New Employment Engine**

The rise of financial technology (fintech) and the aggressive push by traditional banks into digital channels are creating a powerful new engine for high-skill job creation. This is evident across the entire organizational hierarchy.

**Strategic Leadership:** The strategic importance of technology is now reflected at the highest levels of management. The emergence of C-suite positions like Chief Technology Officer (CTO) within financial institutions, including those in the microfinance sector, signifies that technology is a central pillar of corporate strategy.<sup>31</sup> These leaders are tasked with defining an enterprise-wide technology vision that integrates digital lending, mobile payments, and automation. Alongside the CTO, senior management roles such as

Manager, Digital Banking and Director, Information Technology Audit are becoming standard, responsible for driving the growth of digital products and ensuring the security of the underlying infrastructure.<sup>67</sup>

**Product Development and Innovation:** Fintech firms and the digital divisions of banks are actively recruiting professionals to build the next generation of financial services. While specific job titles like Software Developer or UX Designer are detailed in the research framework, their demand is implicitly confirmed by the responsibilities of senior tech leaders. The CTO at Digaf, for example, is responsible for overseeing the development of mobile wallets, digital lending platforms, and Insurtech solutions, which requires a team of developers, product managers, and designers.<sup>31</sup>

**The Platform Economy:** A particularly advanced trend is the emergence of B2B fintech companies that provide financial infrastructure as a service. Firms like Kifiya and Addispay are creating a new "platform economy" within the financial sector.<sup>16</sup> This creates a distinct category of employment focused on building, managing, and



scaling these platforms. The role of

Director, Intelligent Finance as a Service at Kifiya, which involves full P&L ownership and managing a multi-bank ecosystem for AI-driven lending, is a prime example of these new, highly strategic positions.<sup>74</sup>

## 5.2. The Data-Driven Professional: Infusion of Analytics and AI

The increasing availability of data is transforming decision-making in finance, leading to the creation of specialized roles focused on data analysis, artificial intelligence (AI), and cybersecurity.

**Data Science and Financial Analytics:** Dedicated Data Scientist and Financial Analyst positions are emerging as critical functions.<sup>68</sup> These professionals are tasked with a wide range of responsibilities, from developing real-time trading algorithms for equities and crypto markets to building sophisticated financial models for budgeting and forecasting.<sup>68</sup> The application of AI is particularly prominent. ChipChip, an e-commerce platform with integrated finance, seeks an

AI Engineer / Data Scientist specifically to develop pricing and demand forecasting algorithms.<sup>77</sup> In the lending space, AI is being used to build intelligent credit scoring and fraud detection models, a key feature of the platforms being developed by firms like Kifiya and Digaf.<sup>31</sup>

**Cybersecurity as a Core Function:** With digitization comes increased vulnerability to cyber threats, making cybersecurity a non-negotiable, core function for all financial institutions. This has created a new class of security professionals. Roles like Senior Officer, Cyber Security are now integral to a bank's risk management framework.<sup>70</sup> These professionals are responsible for security monitoring, threat investigation, and implementing solutions to prevent cyberattacks. Their work requires deep knowledge of international security standards such as ISO27001 and NIST, as well as financial-specific regulations like the Payment Card Industry Data Security Standard (PCI-DSS).<sup>70</sup>

## 5.3. The Evolution of Traditional Roles and New Talent Archetypes

Technology is not only creating new jobs but also fundamentally altering existing ones. Credit analysis, traditionally a manual process, is being augmented and, in some cases, replaced by AI-powered credit scoring models.<sup>74</sup> Branch banking, once the sole delivery channel, is now complemented by mobile and agent banking networks, requiring branch staff to be proficient in promoting and supporting digital products.<sup>63</sup> Marketing is no longer just about traditional media; it now demands expertise in digital marketing, social media management, and data analytics to target customers effectively.<sup>78</sup>

This technological infusion is creating demand for a new archetype of financial professional: the hybrid talent. A close examination of the most senior and impactful roles in Ethiopian fintech reveals that they are not designed for pure technologists. The CTO at Digaf is not just a head of IT; they are a financial product strategist who understands digital lending and Insurtech.<sup>31</sup> The

Director at Kifiya is not just a platform manager; they are a business leader with P&L responsibility who must understand bank operations, risk management, and partner relations.<sup>74</sup> This indicates that the most critical talent need is for individuals who can bridge the domains of finance, technology, and business strategy. A simple computer science or finance degree is often insufficient for these roles. This reality presents a significant challenge and opportunity for Ethiopia's educational system, which must foster interdisciplinary programs—such as a Master's in Financial Technology or an MBA with a Fintech concentration—to produce the hybrid leaders the market demands.

Furthermore, the simultaneous growth of traditional branch networks and the emergence of advanced B2B fintech platforms suggests that Ethiopia's financial sector may be "leapfrogging" certain legacy stages of technological development seen in more mature economies. Instead of a slow, linear progression from manual to digital, the country is experiencing the parallel expansion of both 20th-century and 21st-century financial job models. This creates a complex challenge for workforce planning, which must cater to the skills required at both ends of this technological spectrum.

The following table isolates these "jobs of the future," detailing the new roles emerging at the intersection of finance and technology.

**Table 4: Emerging Roles in Fintech and Digital Finance: Titles, Skills, and Qualifications**

Emerging Role Title	Core Responsibilities	Key Technical Skills	Required Background
<b>Chief Technology Officer (CTO)</b>	Define and lead enterprise-wide technology vision; oversee development of digital lending, mobile wallets, Insurtech platforms.	Open Banking APIs, Cybersecurity Strategy, Cloud Architecture, Core Banking Systems Integration	Hybrid Finance/Tech; Progressive experience in digital financial services (8-12+ yrs).
<b>Director, Intelligent Finance as a Service</b>	Full P&L ownership of a B2B fintech platform; manage multi-bank partner growth; productize risk and operational support.	Platform-as-a-Service (PaaS) models, AI Credit Scoring, Financial Infrastructure, SLA Management	Banking Transformation/Fintech leadership; Direct experience managing B2B platform growth (12+ yrs).
<b>Data Scientist / AI Engineer</b>	Develop AI-powered models for credit scoring, fraud detection, and pricing algorithms; build data pipelines; analyze large datasets.	Machine Learning (Python/R), Statistical Modeling, Big Data Tools (e.g., Spark), Data Visualization (Power BI)	MSc/BSc in CompSci, Statistics, or related; Experience in ML model deployment (3-5+ yrs).
<b>Cybersecurity Officer</b>	Conduct security monitoring and investigations; implement solutions to remediate cyber threats; ensure compliance with security standards.	Security Frameworks (NIST, ISO27001), Financial Regulations (PCI-DSS, SWIFT CSP), Vulnerability Testing, SOC operations	BSc in CompSci/IT; Experience in IT security, preferably in banking (4+ yrs); CISA/CISSP (advantageous).
<b>Digital Product Development Specialist</b>	Develop and manage retail & MSME digital products; collaborate with IT and business	Agile Methodologies, UI/UX Principles, Software Development	Hybrid Tech/Business; BSc in IT/CompSci with business degree as

	units; define product roadmaps.	Lifecycle, Market Analysis	advantage (4-6+ yrs).
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## Section VI: Strategic Synthesis and Forward-Looking Recommendations

The comprehensive assessment of Ethiopia's financial services employment landscape reveals a sector at a pivotal juncture. It is characterized by robust growth, rapid technological adoption, and a strong drive towards formalization. However, this progress is coupled with significant structural challenges, including critical skills gaps, a geographically concentrated high-skill labor market, and a recruitment ecosystem that could be optimized. To harness the full potential of the Gold Economy and mitigate the risks of an imbalanced workforce, a concerted and collaborative effort is required from educational institutions, government bodies, and the industry itself. This section synthesizes the report's key findings and provides a set of actionable, forward-looking recommendations for these stakeholders.

### 6.1. Consolidated Analysis of Skills Gaps and Opportunities

The analysis of market demand against the available talent pool highlights a clear "heat map" of workforce capabilities.

- 190. **Areas of Surplus:** There appears to be a relative surplus of graduates with generalist business and management degrees who are not equipped with the specific technical or regulatory knowledge required for immediate productivity in the financial sector.
- 191. **Areas of Adequacy:** The supply of talent for traditional, operational banking roles (e.g., Customer Service Officer, Teller) seems adequate to meet current demand, with a steady pipeline of graduates entering these positions.
- 192. **Areas of Critical Shortage:** The most significant and strategic gaps exist in highly specialized fields. These include:
  - 1. **Actuarial Science:** A near-total absence of experienced actuaries, which

hampers the insurance sector's ability to price risk and innovate.<sup>50</sup>

2. **Hybrid Fintech Leadership:** A severe deficit of senior professionals who combine deep knowledge of financial products, technology architecture, and business strategy.<sup>31</sup>
3. **Senior Cybersecurity and Data Science:** A growing but still insufficient pool of experts in cybersecurity for finance and data scientists capable of building and deploying AI/ML models for financial applications.<sup>70</sup>
4. **Dual-Expertise Professionals:** A limited number of senior managers and compliance officers who are fluent in both International Financial Reporting Standards (IFRS) and the nuances of Ethiopian tax and banking regulations.<sup>18</sup>

These shortages represent the most significant constraints on the sector's long-term growth, innovation, and stability. They are also, however, the greatest opportunities for targeted investment in human capital development.

## 6.2. Recommendations for Educational Institutions

Universities and TVET colleges are the primary source of the future financial workforce and must adapt their offerings to meet the clear demands of the market.

193. **Curriculum Modernization:** Business, accounting, and finance degree programs must be urgently updated. This includes moving beyond theoretical concepts to integrate practical, hands-on training in areas explicitly demanded by employers. Curricula should include mandatory modules on **IFRS implementation, Ethiopian tax and banking regulations**, and practical labs using industry-standard software like **Peachtree, ERP systems, and core banking system simulators**.
194. **Launch Specialized, Market-Aligned Programs:** Universities should partner with industry leaders to launch new, specialized graduate programs to fill the most critical skills gaps. This includes establishing:
  1. A **Master of Science in Actuarial Science** program, developed in collaboration with the Ethiopian Reinsurance Share Company and major insurers.
  2. A **Master of Science in Financial Technology (Fintech)**, an interdisciplinary program combining finance, computer science, and business strategy modules.

3. A **Master of Science in Cybersecurity with a specialization in Financial Systems**, designed to produce graduates with knowledge of frameworks like NIST and PCI-DSS.
195. **Strengthen Industry Linkages and Alternative Pathways:** The disconnect between academia and industry must be bridged. This can be achieved by creating **structured, nationwide internship programs** with formal learning objectives, co-managed by universities and financial institutions. Universities should actively **embed industry professionals as guest lecturers and adjunct faculty** to bring real-world case studies into the classroom. Furthermore, institutions should explore and validate **alternative qualification pathways**, such as portfolio-based assessments and competency demonstrations, to recognize skills acquired outside of traditional degree programs.

### **6.3. Recommendations for Policymakers and Regulators (NBE, Ministry of Education)**

Government bodies have a critical role to play in creating an enabling environment for workforce development.

196. **Formulate a National Financial Workforce Development Strategy:** The government, led by the National Bank of Ethiopia and the Ministry of Education, should formulate a cohesive national strategy for the financial sector workforce. This strategy should use the findings of this report to prioritize investment in addressing the identified skills gaps, particularly in actuarial science, fintech, and cybersecurity.
197. **Standardize and Promote Professional Certifications:** To enhance the quality and mobility of the workforce, the government should work with professional bodies like the EBA and AEMFI to formally recognize and promote key international certifications (e.g., ACCA, CFA, PMP, CISA) within the national qualifications framework. This could involve subsidizing exam fees or integrating certification pathways into university curricula.
198. **Incentivize Regional Talent Development and Decentralization:** To counter the extreme geographic concentration of high-skill jobs in Addis Ababa, policymakers should develop incentives to foster regional financial hubs. This could include tax breaks for financial institutions that decentralize specific

headquarters functions (e.g., data analysis centers, compliance monitoring units) to regional cities. Additionally, scholarships and other incentives could be offered to encourage skilled professionals to take up positions in underserved regions.

#### 6.4. Recommendations for Financial Institutions and Industry Associations

The private sector and its representative bodies must take a proactive role in building the talent they need to thrive.

- **Invest in Strategic Talent Management:** Financial institutions must move beyond simply recruiting and invest in systematically developing their own talent. This includes creating **robust internal training and upskilling programs** to cultivate hybrid talent, especially in digital and data analytics. They should establish clear and transparent **career pathways** that allow high-performing employees to move from operational roles in the regions to specialized functions at headquarters.
- **Modernize Recruitment and Talent Intelligence:** Institutions should overhaul their static corporate career portals to transform them into dynamic, reliable, and engaging platforms for attracting talent. They should also leverage the data analytics capabilities of job portals like HahuJobs to gain market intelligence on skills trends, compensation benchmarks, and talent mobility, informing a more strategic approach to recruitment.<sup>79</sup>
- **Collaborate on Talent Creation:** The industry cannot afford to be a passive consumer of talent; it must become an active co-creator. Industry associations like the EBA and AEMFI should lead efforts to forge deep partnerships with universities. This includes **co-creating curricula for the new specialized master's programs**, providing corporate sponsorship for faculty and research in fintech and sustainable finance, and pooling resources to fund state-of-the-art financial technology labs on university campuses. This collaborative approach will ensure a sustainable, long-term pipeline of talent that is precisely aligned with the future needs of Ethiopia's Gold Economy.

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# Ethiopia's Green Economy Workforce: A Nationwide Occupational and Skills Analysis for 2025

## Part I: The Strategic Context for Green Employment in Ethiopia

### 1.1 The Policy Mandate: CRGE and the Green Legacy Initiative

The employment landscape of Ethiopia's green economy is fundamentally shaped by a robust national policy framework, designed to steer the country towards a sustainable and prosperous future. The cornerstone of this framework is the **Climate-Resilient Green Economy (CRGE) strategy**, launched in 2011. This ambitious national vision aims to transition Ethiopia to a middle-income country by 2025, with a per capita GDP of over USD 1,000, while achieving this goal through a carbon-neutral growth trajectory.<sup>1</sup> The strategy explicitly recognizes that a conventional development path would lead to a sharp increase in greenhouse gas (GHG) emissions and the unsustainable depletion of natural resources.<sup>5</sup>

To avert this, the CRGE sets a target of limiting Ethiopia's net GHG emissions in 2030 to 150 megatonnes of CO<sub>2</sub> equivalent (MtCO<sub>2</sub>e), the level recorded in 2010. This represents an abatement of approximately 250 MtCO<sub>2</sub>e compared to the projected 400 MtCO<sub>2</sub>e under a business-as-usual scenario.<sup>2</sup> Achieving this target requires a profound economic transformation, driven by over 60 prioritized green initiatives structured around four key pillars<sup>2</sup>:

199. **Improving crop and livestock production practices** to enhance food security and farmer incomes while reducing emissions.
200. **Protecting and re-establishing forests** for their economic and ecosystem services, including their function as vital carbon stocks.

201. **Expanding electricity generation from renewable sources** for both domestic consumption and export to regional markets.
202. **Leapfrogging to modern and energy-efficient technologies** in transport, industry, and buildings.

This policy framework is not merely aspirational; it is the primary engine of demand for a new and specialized green workforce. The implementation of these pillars necessitates a wide range of skills and occupations, from agricultural extension workers trained in climate-smart techniques to engineers capable of developing Ethiopia's vast renewable energy potential.

A particularly visible and impactful component of the CRGE's forestry pillar is the **Green Legacy Initiative (GLI)**, launched in 2019.<sup>9</sup> While its primary goal is environmental restoration through mass afforestation and reforestation, the GLI has simultaneously become one of the most significant job creation programs in the country. The initiative has reportedly led to the establishment of over 120,000 nurseries nationwide, which in turn have created more than

**767,000 jobs**, with a specific focus on empowering women and youth.<sup>9</sup> The GLI, therefore, functions as a critical entry point into the green economy for a large segment of the population, providing primarily low-skill, seasonal, and informal employment in seedling production and tree planting. The long-term vision for the initiative includes developing market value chains for non-timber forest products like wild honey, spices, and gums, potentially transitioning these jobs towards more sustainable livelihoods.<sup>13</sup>

## **1.2 The Ecosystem of Green Growth: Key Actors and Financial Flows**

The implementation of Ethiopia's green ambitions is managed by a complex ecosystem of government bodies, international development partners, and a nascent private sector. Understanding this institutional landscape is crucial for mapping employment opportunities, as hiring patterns and skill demands are directly influenced by the priorities and funding flows of these key actors.

At the governmental level, the **Ministry of Environment, Forest and Climate Change (MEFCC)** serves as the lead coordinating body for environmental policy,



including initiatives like REDD+ (Reducing Emissions from Deforestation and Forest Degradation).<sup>14</sup> The

**Ethiopian Energy Authority (EEA)** and state-owned enterprises like **Ethiopian Electric Power (EEP)** are central to the renewable energy pillar, overseeing the development of hydro, solar, and wind resources.<sup>17</sup> A pivotal component of the financial architecture is the

**CRGE Facility**, housed within the Ministry of Finance (MoF). This facility was established to mobilize, access, and channel climate finance from various sources to support the implementation of the CRGE strategy across key sectors like agriculture, energy, and forestry.<sup>21</sup>

However, the scale of the required investment—estimated at around **USD 150 billion over 20 years**—far exceeds domestic capacity, creating a significant financing gap.<sup>2</sup> This gap is where international development partners play a critical role.

**Multilateral Development Banks (MDBs)** are major financiers and technical advisors. The **World Bank** supports a wide portfolio of projects, including the Resilient Landscapes and Livelihoods Project, initiatives for private sector competitiveness and job creation in industrial parks with green standards, and crucial institutional support for developing a national green taxonomy to guide sustainable investment.<sup>23</sup> The

**African Development Bank (AfDB)** is also heavily invested, supporting the development of a National Circular Economy Roadmap, promoting agro-industrialization, and facilitating green investment programs across the continent that benefit Ethiopia.<sup>29</sup>

**Bilateral partners and UN agencies** provide further targeted support. The **United Nations Development Programme (UNDP)** focuses on innovative financing mechanisms like green bonds and carbon credits, sustainable forest value chains, and the transfer of renewable energy technologies.<sup>33</sup> The German development agency,

**GIZ**, is deeply involved in strengthening the workforce through vocational training (TVET), promoting SME development in green sectors, improving access to clean energy in rural areas, and advising on climate-sensitive land management.<sup>38</sup>

The result of this financial architecture is an employment market where a substantial number of opportunities, particularly for skilled professionals, are tied to the life

cycles of donor-funded projects. This creates a dynamic but often precarious employment environment characterized by fixed-term contracts and fluctuating demand based on evolving donor priorities.

### 1.3 The Policy-Finance-Employment Nexus

A deeper analysis of the interplay between policy, finance, and employment reveals a complex and evolving structure within Ethiopia's green economy. The market is not monolithic; rather, it exhibits distinct characteristics that have profound implications for workforce development and long-term sustainability.

First, a **"two-tiered" green job market** is clearly discernible. The first tier consists of large-scale, predominantly low-skill employment generated by government-led, mass-mobilization campaigns. The Green Legacy Initiative is the prime example, creating hundreds of thousands of jobs in nursery development and tree planting.<sup>9</sup> While impressive in scale, these opportunities are often seasonal, informal, and lack clear pathways for career progression. The second tier comprises a smaller but more specialized set of technical, managerial, and advisory roles driven by the projects of international development partners and a nascent private sector. Job advertisements from these organizations consistently emphasize the need for "capacity building," "employability skills," and the creation of "sustainable" livelihoods, often for a limited number of beneficiaries.<sup>41</sup> This reveals a critical dependency: the long-term viability and sustainability of the massive Tier 1 workforce are contingent upon the success of the smaller, more strategic Tier 2 projects that are designed to build the necessary systems, policies, and market linkages.

Second, a significant portion of the skilled green workforce operates within a **projectized and donor-dependent ecosystem**. The CRGE strategy itself acknowledges a substantial funding gap that cannot be met by domestic resources alone.<sup>2</sup> Consequently, development partners like the World Bank, AfDB, and UNDP are funding a host of discrete projects to address specific needs, such as resilient landscapes, circular economy development, or green finance capacity.<sup>25</sup> Job vacancies frequently reference these specific, time-bound projects, such as the "Green Grow Project" funded by the Canadian government and implemented by SOS Children's Villages.<sup>41</sup> This means that hiring patterns are intrinsically linked to donor

funding cycles, leading to a prevalence of fixed-term contracts and a demand for skills that can fluctuate based on which partner is funding which type of intervention at any given time. This poses a challenge for long-term, stable workforce planning.

Third, a nascent but critically important **"green finance" sub-sector is emerging** as the foundational infrastructure for a more sustainable economic model. The appearance of specialized roles like "Head of Green Financing" within private companies <sup>45</sup> is not an isolated event. It is a direct response to strategic national efforts, supported by partners like the European Investment Bank, to develop a

**National Green Taxonomy.**<sup>24</sup> This taxonomy will create clear, standardized definitions for what constitutes a sustainable investment. This, in turn, enables the development and marketing of new financial instruments like

**green bonds, carbon credits, and debt-for-nature swaps.**<sup>29</sup> The government and its partners recognize that mobilizing the vast private capital needed to fund the CRGE is impossible without these clear rules, financial products, and the skilled professionals to manage them. Therefore, the development of this highly specialized financial sub-sector is a powerful leading indicator for the future stability and growth of the thousands of jobs in the broader green economy. The success of these few finance roles is a causal prerequisite for transitioning from a donor-dependent model to a self-sustaining, market-driven green economy.

## **Part II: The Landscape of Green Economy Sectors and Occupations**

The following sections provide a systematic mapping of employment opportunities across the key sectors of Ethiopia's green economy. This analysis is based on a comprehensive review of government strategies, development partner project documents, and publicly available job announcements from a range of digital platforms. While the full, eleven-dimension profile of each identified occupation is provided in the accompanying structured datasets, this narrative summarizes the context and key roles within each sector.

## 2.1 Renewable Energy Systems

**Context:** The expansion of renewable energy is a central pillar of the CRGE, with Ethiopia possessing immense, largely untapped potential in hydropower, solar, wind, and geothermal resources.<sup>22</sup> The national strategy aims to increase power generation capacity fivefold, not only to meet domestic demand and support industrialization but also to become a major electricity exporter in the region.<sup>2</sup> This ambition is supported by programs like GIZ's Energising Development (EnDev) partnership, which focuses on creating a reliable supply of clean energy for off-grid households and small enterprises, particularly in rural areas.<sup>39</sup> The sector thus offers a wide spectrum of opportunities, from large-scale public infrastructure projects to decentralized, private-sector-led solutions.

### Occupational Profiles:

- **Solar PV Installer/Technician:** This is a high-growth occupation found in both formal and informal markets. Formally, technicians are employed by solar energy companies to conduct site assessments, install panels and inverters, and perform maintenance for residential and commercial clients. Informally, many self-employed individuals offer installation and repair services, particularly for smaller, off-grid systems in rural areas. Demand is driven by the national push for rural electrification and the declining cost of solar technology.<sup>39</sup>
- **Renewable Energy Sales Representative:** As advertised by private companies<sup>48</sup>, these roles are crucial for market creation. Responsibilities include developing sales strategies, delivering technical presentations to prospective customers, assessing client energy needs, and collaborating with engineering teams to design appropriate systems. This role requires a hybrid skill set, blending technical knowledge of renewable energy solutions with strong sales, negotiation, and customer relationship management capabilities.
- **Hydropower Engineer:** These highly specialized engineers are primarily employed by state-owned enterprises like Ethiopian Electric Power (EEP)<sup>18</sup> and large engineering consulting firms. They are involved in the design, construction supervision, and operational management of Ethiopia's large-scale hydropower dams, which form the backbone of the national grid.
- **Biogas Technician:** These are typically community-level roles, often supported by NGOs or agricultural extension programs. Technicians assist rural households in constructing, operating, and maintaining small-scale biogas digesters, which

convert animal manure into cooking gas. This role supports the CRGE's goals of reducing reliance on biomass for fuel and mitigating GHG emissions from livestock.<sup>1</sup>

- **Wind Farm Site Manager:** A specialized project management role tied to the development and operation of large-scale wind energy projects. These individuals oversee all on-site activities, including construction, turbine maintenance, and operational logistics, requiring a strong background in engineering and large-scale project management.

## 2.2 Energy Efficiency and Management

**Context:** Complementing the focus on renewable energy generation is a growing emphasis on energy conservation and efficiency. The CRGE identifies leapfrogging to energy-efficient technologies in buildings and industry as a key pillar for sustainable growth.<sup>2</sup> This involves reducing energy consumption through better design, modern appliances, and optimized industrial processes, which in turn lowers costs and reduces the strain on the national grid.

### Occupational Profiles:

- **Energy Auditor:** A specialized consultant who assesses energy consumption in buildings, factories, and other facilities. They use diagnostic tools to identify areas of energy waste and recommend specific interventions, such as installing efficient lighting, improving insulation, or upgrading machinery. This role requires a strong analytical background and knowledge of building systems and energy audit standards.
- **Efficient Lighting Retrofit Specialist:** A technical role focused on replacing outdated, inefficient lighting systems (e.g., incandescent bulbs) with modern, energy-saving alternatives like LEDs in commercial and public buildings. This can be a full-time role within a large facility management company or freelance work for smaller projects.
- **Industrial Process Optimization Consultant:** An engineering role that works with manufacturing plants, particularly in high-emission sectors like cement, to improve the efficiency of their production processes. This could involve recommending new technologies or modifying operational procedures to reduce fuel and electricity consumption per unit of output, directly contributing to the

CRGE's industrial abatement goals.<sup>7</sup>

## 2.3 Sustainable Transport and Mobility

**Context:** While the transport sector's current contribution to national GHG emissions is relatively small, it is projected to grow rapidly with economic development.<sup>7</sup> The CRGE strategy preemptively addresses this by promoting a shift towards modern, energy-efficient transport systems.<sup>2</sup> This includes planning for low-emission public transport, developing infrastructure for electric vehicles (EVs), and promoting non-motorized transport like cycling and walking in urban areas.

### Occupational Profiles:

- **Urban Transport Planner:** Employed by municipal governments (especially in Addis Ababa) and consulting firms, these professionals design and plan urban transportation systems. In the green economy context, their focus is on integrating public transit networks (like light rail), creating dedicated bus lanes, and designing safe infrastructure for pedestrians and cyclists to reduce reliance on private cars.
- **Electric Vehicle (EV) Infrastructure Specialist:** An emerging technical role focused on the planning and installation of EV charging stations. As the market for EVs grows, these specialists will be needed by energy companies, real estate developers, and municipal authorities to build out the necessary charging network.
- **Non-Motorized Transport (NMT) Coordinator:** A project-based role, often within NGOs or city government, dedicated to advocating for and implementing NMT initiatives. This includes community outreach, planning for new bike lanes and pedestrian walkways, and organizing public awareness campaigns.

## 2.4 Sustainable Agriculture and Agroecology

**Context:** Agriculture is the backbone of the Ethiopian economy, employing around 80% of the population and contributing over 40% of GDP.<sup>49</sup> It is also highly vulnerable

to climate change and a significant source of GHG emissions. Consequently, the CRGE's first pillar is dedicated to improving crop and livestock practices to increase productivity and income in a climate-smart, low-emission manner.<sup>1</sup> This is supported by large-scale programs like the World Bank's Resilient Landscapes and Livelihoods Project (RLLP), which promotes climate-smart agriculture and livelihood diversification.<sup>25</sup>

### **Occupational Profiles:**

- 203. **Agronomy/Forestry/Sustainability Officer:** A role advertised by private agribusiness companies requiring a degree in agronomy, plant science, or forestry.<sup>50</sup> Responsibilities include providing technical advice to farmers on sustainable practices, managing supply chains for sustainable products, and ensuring compliance with environmental standards.
- 204. **Soil and Water Conservation Specialist:** Often employed by government agricultural bureaus or NGOs working on watershed management projects. These specialists train farmers on techniques like terracing, contour farming, and building check dams to reduce soil erosion and improve water retention, which are critical for adapting to erratic rainfall.<sup>7</sup>
- 205. **Climate-Smart Agriculture Consultant:** A freelance or project-based expert who advises farmer cooperatives, NGOs, or government programs on integrating climate resilience into farming systems. This includes promoting drought-resistant crop varieties, improving irrigation efficiency, and implementing agroforestry systems.
- 206. **Agroecology Expert:** A specialist role focused on applying ecological principles to agricultural systems. This involves promoting biodiversity, natural pest control, and closed-loop nutrient cycling to create resilient and productive farms with minimal external inputs. These experts may work for research institutions, NGOs, or as independent advisors.

## **2.5 Forestry and Land Management**

**Context:** Protecting and re-establishing forests is a cornerstone of the CRGE, recognized for its dual benefits of carbon sequestration and providing essential ecosystem services.<sup>1</sup> This sector is a massive source of employment, with the CRGE Facility reporting the creation of over



**272,000 permanent jobs** and thousands of seasonal ones.<sup>22</sup> This is driven by the high-profile Green Legacy Initiative <sup>9</sup> and major donor-funded programs like the World Bank's Sustainable Land Management Programme (SLMP) and RLLP.<sup>7</sup>

### **Occupational Profiles:**

- **Nursery Worker/Manager:** This is the most common entry-level job in the sector, created in the hundreds of thousands by the GLI.<sup>10</sup> The work involves producing and caring for seedlings for mass planting campaigns. It is often seasonal and informal, providing a crucial source of income for women and youth in rural areas.<sup>12</sup>
- **Forestry Officer:** A formal government or NGO position requiring a degree in Forestry or a related field. Responsibilities include developing sustainable forest management plans, coordinating community-based forestry programs, monitoring forest health, and enforcing regulations.<sup>50</sup>
- **Watershed Management Coordinator:** A project-based role, common in regions like Amhara and Oromia, focused on the integrated management of entire watersheds. This involves coordinating activities like reforestation, soil and water conservation, and gully rehabilitation to restore degraded landscapes and improve water security.<sup>7</sup>
- **Senior Environmental Specialist – Land Management:** A high-level expert role, such as those advertised by the World Bank.<sup>51</sup> This position requires a Master's or PhD and extensive experience. Responsibilities include providing thought leadership on land administration and restoration, leading policy dialogue with the government, and designing and supervising large-scale lending operations in the landscape management sector.
- **REDD+ Project Coordinator:** A highly specialized role focused on the financial and technical mechanisms for forest-based carbon offsetting. These professionals work on developing systems for Monitoring, Reporting, and Verification (MRV) of carbon stocks, engaging with international carbon markets, and ensuring benefit-sharing mechanisms are in place for local communities. This work is often done in collaboration with international bodies like the Forest Carbon Partnership Facility (FCPF) and GGGI.<sup>14</sup>

## **2.6 Water Resource Management**

**Context:** Ethiopia faces significant water security challenges, exacerbated by climate variability, recurrent droughts, and land degradation.<sup>25</sup> The green economy strategy emphasizes the need for sustainable water resource management, including improving access to potable water, enhancing irrigation efficiency, and managing wastewater. Donor-funded projects, like those supported by the Green Climate Fund (GCF), often focus on providing climate-resilient community access to safe water.<sup>21</sup>

### **Occupational Profiles:**

- **Water Quality Monitoring Specialist:** A technical role within government water bureaus, environmental agencies, or NGOs. Responsibilities include collecting water samples from rivers, lakes, and groundwater sources, conducting laboratory tests for pollutants, and analyzing data to ensure compliance with quality standards.
- **Irrigation Efficiency Consultant:** An agricultural engineering role focused on helping farmers and water user associations improve the efficiency of their irrigation systems. This can involve advising on the adoption of modern technologies like drip or sprinkler irrigation, improving canal maintenance, and developing fair water allocation schedules.
- **Wastewater Treatment Technician:** Employed by municipalities or industrial facilities, these technicians operate and maintain wastewater treatment plants. Their work is crucial for preventing water pollution and enabling the safe reuse of treated water for agriculture or industrial purposes, a key component of a circular economy.
- **Environmental Health Assistant:** An entry-level field position, often with NGOs like the IRC, involved in the hands-on implementation of Water, Sanitation, and Hygiene (WASH) projects.<sup>54</sup> Responsibilities include supervising the construction of wells and latrines, mobilizing community labor, and ensuring the quality of construction materials.

## **2.7 Waste Management and Circular Economy**

**Context:** Urbanization and economic growth are leading to increasing waste generation in Ethiopia, creating both environmental challenges and economic opportunities. This sector is an emerging priority, with the AfDB supporting the development of a **National Circular Economy Roadmap** to create an enabling

environment for resource efficiency and green job creation.<sup>31</sup> NGO-led projects are also focusing on building the capacity of Small and Medium Enterprises (SMEs) to engage in waste collection, recycling, and value addition.<sup>44</sup>

### **Occupational Profiles:**

- **Solid Waste Management Sector Lead:** A senior, strategic role seen in NGO consortium programs.<sup>55</sup> This position involves developing sector-wide strategies, managing teams, liaising with government and private sector stakeholders, and building the capacity of waste collection SMEs. It requires extensive experience in program management and a deep understanding of the waste sector.
- **Recycling Program Coordinator:** A role within municipalities or NGOs responsible for designing, launching, and managing community-based recycling programs. This includes public awareness campaigns, establishing collection points, and creating linkages with recycling companies.
- **Circular Economy Study Consultant:** A short-term, expert role hired by organizations like ISF to conduct feasibility studies and market analyses for circular economy initiatives in specific regions, such as the Somali Region.<sup>44</sup> This work identifies viable business opportunities, maps cultural barriers, and provides recommendations for project design.
- **Informal Waste Collector (e.g., "Qorales"):** This represents the vast informal workforce that is the backbone of recycling in Ethiopia. These individuals collect, sort, and sell recyclable materials like plastics, metals, and paper. While crucial to the circular economy, they often work in hazardous conditions with no formal employment rights or social protection.

## **2.8 Environmental Monitoring and Geographic Information Systems (GIS)**

**Context:** Effective environmental management, climate adaptation planning, and natural resource governance depend on accurate and timely data. The use of modern tools like GIS, remote sensing, and mobile data collection applications is becoming increasingly standard in the sector. These technologies are essential for monitoring deforestation, mapping watershed degradation, assessing climate risks, and managing large-scale environmental projects.

### **Occupational Profiles:**

- **GIS/Remote Sensing Specialist:** A technical expert employed by government agencies (e.g., MEFCC), research institutions, and large NGOs. Responsibilities include acquiring and processing satellite imagery, creating thematic maps, conducting spatial analysis to monitor land-use change, and supporting project planning and M&E.<sup>56</sup>
- **Environmental Officer:** A common role in both public and private sectors, responsible for ensuring compliance with environmental regulations.<sup>57</sup> Duties include conducting site inspections, performing environmental monitoring (air, water, soil), investigating incidents, preparing compliance reports, and delivering environmental awareness training.
- **Biodiversity Monitoring Coordinator:** A specialist role within conservation organizations or government bodies responsible for protected areas. They design and implement programs to monitor wildlife populations and ecosystem health, often using a combination of field surveys, camera traps, and data analysis.
- **M&E (Monitoring and Evaluation) Officer:** A role found in virtually every donor-funded project.<sup>15</sup> In the green economy context, M&E Officers are responsible for tracking project indicators related to environmental outcomes (e.g., hectares reforested, tons of waste recycled) and social benefits (e.g., jobs created, incomes increased), often using digital data collection tools.

## 2.9 Climate Change Mitigation and Adaptation Services

**Context:** As a country highly vulnerable to the impacts of climate change, building resilience is a top priority for Ethiopia.<sup>23</sup> The

**National Adaptation Plan (NAP-ETH)** outlines 18 priority adaptation options, from improving early warning systems to building climate-resilient infrastructure.<sup>60</sup> Simultaneously, the CRGE's mitigation goals require expertise in carbon accounting and project development to access international climate finance.

### Occupational Profiles:

- **Climate Change Advisor:** A senior advisory role, often within international organizations like GIZ, working closely with government partners like the African Union Commission.<sup>43</sup> Responsibilities include providing policy advice, supporting the implementation of climate programs, organizing capacity-building

workshops, and fostering stakeholder partnerships.

- **Climate Risk Assessment Specialist:** A technical consultant who analyzes climate data and models to assess the future risks of hazards like drought and flooding on communities, infrastructure, and economic sectors. Their work informs the design of adaptation strategies and resilient projects.
- **Carbon Accounting/Offset Project Developer:** A specialized role in the private or NGO sector focused on developing projects that generate carbon credits (e.g., through reforestation or renewable energy). This requires expertise in specific carbon standards (like Verra or Gold Standard), project design documentation, and navigating the complexities of carbon markets.
- **Community Resilience Coordinator:** A field-based position within NGOs implementing adaptation projects. They work directly with communities to identify climate vulnerabilities and implement local adaptation plans, such as promoting drought-tolerant crops, developing alternative livelihoods, and establishing community-based disaster risk management committees.<sup>21</sup>

## 2.10 Green Buildings and Sustainable Construction

**Context:** With rapid urbanization and infrastructure development, the buildings and construction sector is a growing source of energy consumption and emissions.<sup>7</sup> The green economy strategy promotes leapfrogging to energy-efficient technologies and sustainable practices in this sector.<sup>3</sup> This creates a demand for professionals who can design, construct, and certify buildings that minimize their environmental footprint.

### Occupational Profiles:

- **Green Building Architect/Designer:** An architect with specialized knowledge of sustainable design principles. This includes passive design strategies (for natural lighting and ventilation), specification of sustainable materials, and integration of renewable energy and water-saving systems into building designs.
- **Sustainable Materials Sourcing Specialist:** A role within construction companies or architectural firms responsible for identifying and procuring environmentally friendly building materials. This involves researching materials with low embodied carbon, high recycled content, and local sourcing to reduce transport emissions.
- **Building Energy Modeler:** A specialized engineer who uses software to simulate

the energy performance of a building at the design stage. Their analysis helps architects and engineers optimize the design to achieve high levels of energy efficiency and meet green building standards.

- **Green Building Certification Expert (e.g., LEED, BREEAM):** A consultant who guides project teams through the process of achieving certification under international green building rating systems. This requires deep knowledge of the specific certification requirements and the ability to manage the documentation and verification process.

## 2.11 Environmental Policy, Planning, and Governance

**Context:** The entire green economy transition is underpinned by a framework of policies, laws, and regulations. Effective governance requires a cadre of professionals who can analyze policy, ensure regulatory compliance, and conduct rigorous assessments of development projects. This sector is concentrated in Addis Ababa, the seat of government and international organizations.

### Occupational Profiles:

- **Environmental Policy Analyst:** Employed by government ministries, think tanks, or international organizations, these analysts research and evaluate environmental policies. They provide evidence-based recommendations for policy reform and contribute to the development of new strategies and regulations.
- **Environmental Impact Assessment (EIA) Consultant:** A licensed professional who conducts EIAs for proposed development projects (e.g., factories, dams, roads) as required by Ethiopian law. They assess potential environmental and social impacts and propose mitigation measures. This is a major area for freelance and consultancy work.<sup>61</sup>
- **Regulatory Compliance Advisor:** A role within private companies, particularly in the industrial and manufacturing sectors, responsible for ensuring the company's operations comply with all national environmental laws and standards.
- **Environmental Lawyer:** A legal professional specializing in environmental law. They may work for government agencies on enforcement, for NGOs on advocacy and litigation, or for private firms advising clients on environmental liabilities and compliance.

## 2.12 Sustainable Tourism and Eco-Tourism

**Context:** Ethiopia's rich natural and cultural heritage provides significant potential for a tourism industry that is both economically beneficial and environmentally sustainable. Eco-tourism and community-based tourism models are promoted as ways to generate income for local communities while creating incentives for the conservation of biodiversity and ecosystems.

### Occupational Profiles:

- **Eco-Lodge Manager/Operator:** Manages tourist lodges that are designed and operated on principles of sustainability. This includes using renewable energy, practicing water conservation and waste management, sourcing food locally, and hiring staff from the surrounding communities.
- **Community-Based Tourism Coordinator:** A role often supported by conservation NGOs, working with local communities to develop and manage tourism enterprises. This involves training community members as guides, developing cultural experiences for tourists, and establishing benefit-sharing mechanisms to ensure tourism revenue supports local development and conservation efforts.
- **Nature/Wildlife Guide:** A guide with specialized knowledge of a region's flora, fauna, and ecosystems. They lead tourists on treks, wildlife viewing excursions, and birdwatching tours, providing interpretation and ensuring that tourism activities have minimal impact on the environment.

## 2.13 Green Finance and Investment

**Context:** As established in Part I, this is a small but strategically critical emerging sector. Mobilizing the estimated USD 150 billion needed for the CRGE requires a sophisticated financial ecosystem capable of attracting and managing private capital for green projects.<sup>2</sup> National strategies are now actively focused on creating this ecosystem through initiatives like the Green Taxonomy and the exploration of new financial instruments.<sup>24</sup>



### Occupational Profiles:

- **Head of Green Financing:** A senior management position within a financial institution or company, responsible for developing and managing a portfolio of loans and financial products for environmentally sustainable projects, such as renewable energy or EVs.<sup>45</sup> This role requires a combination of financial acumen and an understanding of sustainability criteria.
- **Green Bond Analyst:** A specialist within an investment bank or financial advisory firm who works on structuring and issuing green bonds. This involves identifying eligible green projects, ensuring compliance with green bond principles, and marketing the bond to investors.
- **Carbon Market Analyst/Trader:** An expert who tracks global and regional carbon markets, advises companies on carbon offset strategies, and facilitates the buying and selling of carbon credits generated from Ethiopian projects (e.g., from the Oromia Forested Landscape Program).<sup>53</sup>
- **Environmental and Social Governance (ESG) Analyst:** A role within investment firms or development finance institutions that assesses the ESG performance of potential investments. They analyze companies' environmental practices, social impacts, and governance structures to identify risks and opportunities.

## 2.14 Environmental Education and Training

**Context:** Building a green economy requires not only a skilled workforce but also a knowledgeable and engaged citizenry. Environmental education and training are essential for raising public awareness, promoting sustainable behaviors, and delivering the specific skills needed for green jobs. This sector includes formal education, vocational training, and community-level outreach.

### Occupational Profiles:

1. **TVET Trainer (Green Skills):** Instructors at Technical and Vocational Education and Training (TVET) colleges who deliver courses in green-related trades, such as solar installation, sustainable agriculture, or waste management. GIZ and other partners are working to strengthen the capacity of TVETs to deliver market-relevant green skills training.<sup>41</sup>
2. **University Lecturer (Environmental Science/Studies):** Academics at

universities who teach and conduct research in fields like environmental science, climate change, and sustainable development, training the next generation of environmental professionals.

3. **Community Awareness Program Coordinator:** An NGO or government role focused on designing and implementing public awareness campaigns on environmental issues. This can involve organizing workshops, using local media, and developing educational materials to promote practices like recycling, water conservation, or tree planting.

## 2.15 Emerging Green Technology and Innovation

**Context:** Technological innovation is a key enabler for accelerating the green transition. This emerging sector involves the research, development, and application of new technologies to solve environmental challenges. This includes advancements in renewable energy, smart agriculture, environmental monitoring, and digital platforms.

### Occupational Profiles:

4. **Clean Technology R&D Scientist:** A research role within a university or a tech startup focused on developing new green technologies, such as more efficient solar cells, new materials from waste products, or advanced water purification systems.
5. **IoT for Environment Specialist:** An engineer or technician who designs and deploys Internet of Things (IoT) sensor networks for environmental monitoring. This could involve using sensors to monitor water quality in real-time, track air pollution levels in cities, or optimize irrigation in smart farming systems.
6. **Drone Pilot for Environmental Surveys:** A licensed drone operator with skills in using drones equipped with specialized sensors (e.g., LiDAR, multispectral) to conduct environmental surveys. This is used for tasks like forest inventory assessment, crop health monitoring, and mapping of land degradation with high precision.

### Table 1: Summary of Green Employment Demand by Sector

Sector Name	Estimated Market Size (Job Ads)	Key Employer Types	Dominant Employment Type	Growth Trajectory	Key Policy/Program Driver
<b>Forestry &amp; Land Management</b>	High	Government, NGO, Community	Informal, Project-based	Stable (High Volume)	Green Legacy Initiative, CRGE, RLLP
<b>Sustainable Agriculture</b>	High	Government, NGO, Private	Formal, Informal	Stable	CRGE, AGP, SLMP
<b>Water Resource Management</b>	Medium	Government, NGO	Project-based, Formal	Stable	National Adaptation Plan (NAP-ETH)
<b>Renewable Energy Systems</b>	Medium	Private, Government (EEP)	Formal, Informal (Solar)	High	CRGE, National Electrification Program
<b>Env. Monitoring &amp; GIS</b>	Medium	NGO, Government, Academia	Formal, Project-based	High	Donor M&E Requirements
<b>Env. Policy &amp; Governance</b>	Medium	Government, NGO, Consultancy	Formal, Freelance	Stable	CRGE, Environmental Regulations
<b>Climate Change Services</b>	Medium	NGO, International Orgs	Project-based, Consultancy	High	NAP-ETH, NDC Commitments
<b>Waste Mgt. &amp; Circular Econ.</b>	Low	NGO, SME, Informal	Informal, Project-based	High (Emerging)	National Circular Economy Roadmap
<b>Energy Efficiency</b>	Low	Consultancy, Private	Freelance, Formal	Medium (Emerging)	CRGE Pillar 4
<b>Green</b>	Low	Financial	Formal,	High	National

<b>Finance &amp; Investment</b>		Institutions, Dev. Partners	Consultancy	(Emerging)	Green Taxonomy, CRGE Facility
<b>Env. Education &amp; Training</b>	Low	TVETs, Universities, NGOs	Formal, Project-based	Medium	National Skills Development
<b>Sustainable Transport</b>	Low	Government (Municipal)	Formal, Project-based	Medium (Emerging)	Urban Development Plans
<b>Green Buildings</b>	Low	Consultancy, Private	Freelance, Formal	Medium (Emerging)	CRGE Pillar 4
<b>Sustainable Tourism</b>	Low	Private, Community	Formal, Informal	Medium	National Tourism Strategy
<b>Emerging Green Technology</b>	Low	Academia, Startups	Formal, Research	High (Emerging)	National Innovation Policies

## Part III: A Profile of the Green Workforce: Competencies and Pathways

Building Ethiopia's green economy requires a workforce equipped with a diverse array of technical, analytical, and interpersonal skills. The demand for these competencies cuts across sectors, creating a profile of the "ideal" green professional. This section analyzes the most sought-after skills and maps the educational and professional pathways that lead to successful careers in this field.

### 3.1 High-Demand Technical and Domain Competencies

A cross-sectoral analysis of job requirements reveals a core set of technical skills that are consistently in high demand. These competencies form the practical foundation for much of the work in the green economy.

7. **Data & Geospatial Skills:** The ability to collect, manage, analyze, and visualize spatial data is one of the most transferable and valuable skill sets. Proficiency in **Geographic Information Systems (GIS) software** like ArcGIS and QGIS, along with remote sensing techniques, is a prerequisite for roles in environmental monitoring, land use planning, forestry, watershed management, and climate risk assessment. Job descriptions for roles like "Senior ICT and GIS Specialist" highlight the need to design web portals for data archiving and enable analysis of key variables to inform programming.<sup>56</sup>
8. **Environmental & Social Management Skills:** As most significant green projects are funded by international partners like the World Bank, expertise in their environmental and social safeguard policies is critical. This includes the ability to conduct **Environmental Impact Assessments (EIA)** and Social Impact Assessments (SIA), and to develop and implement Environmental and Social Management Frameworks (ESMF) and Plans (ESMP). These skills are essential for consultants and specialists working on infrastructure, energy, and large-scale landscape projects to ensure they are sustainable and compliant.<sup>27</sup>
9. **Engineering & Field-Based Technical Skills:** This category encompasses a range of hands-on competencies. In the renewable energy sector, this includes **solar PV system design and installation**.<sup>39</sup> In water management, it involves **water quality testing methods** and the construction of water supply systems.<sup>54</sup> In agriculture, it includes **soil analysis procedures** and the implementation of modern irrigation techniques. For energy efficiency, it involves the use of **energy audit tools** to diagnose and measure energy consumption in buildings and industry.<sup>41</sup>
10. **Financial & Economic Skills:** The push to move beyond donor funding has created a new and urgent demand for financial expertise. This includes skills in **green finance**, the ability to conduct **financial modeling for renewable energy projects**, expertise in **carbon accounting** methodologies, and a working knowledge of international **carbon markets** and offset project development (e.g., REDD+).<sup>24</sup> These skills are foundational to making the green economy commercially viable.
11. **Agricultural & Ecological Skills:** Given that agriculture and land use are central to the CRGE, deep domain knowledge in these areas is crucial. This includes expertise in **agroecology**, which applies ecological principles to farming;

**climate-smart agriculture**, which integrates adaptation and mitigation measures; **soil and water conservation** techniques to combat land degradation; and the principles of **organic farming** and sustainable certification.<sup>1</sup>

### 3.2 Essential Interpersonal and Communication Capabilities

Beyond technical knowledge, employers consistently emphasize a set of "soft skills" that are essential for navigating the complex social and institutional dynamics of green development in Ethiopia.

12. **Stakeholder Engagement & Community Facilitation:** Perhaps the most critical non-technical skill is the ability to effectively engage with a wide range of stakeholders. Green economy projects are rarely purely technical; they involve negotiating with government officials, collaborating with private sector partners, and, most importantly, facilitating the participation of local communities, farmers, and pastoralists. Job descriptions across sectors—from forestry to climate adaptation—repeatedly call for proven skills in community mobilization, facilitation, and building consensus.<sup>14</sup>
13. **Communication & Reporting:** The ability to communicate complex information clearly and effectively is paramount. This includes writing high-quality technical reports, policy briefs, and project proposals, as well as delivering compelling presentations to diverse audiences, from community meetings to high-level policy forums. Strong report-writing skills are a standard requirement in most professional-level vacancies.<sup>43</sup>
14. **Language Proficiency:** The green economy workforce must be multilingual. While **English** is the standard language for technical documentation, reporting, and international collaboration, proficiency in Ethiopia's national and regional languages is essential for effective fieldwork. **Amharic** is widely required, and knowledge of **Oromo (Afan Oromo)**, **Tigrinya**, **Somali**, and other local languages is often a mandatory qualification for community-facing roles, underscoring the need for a deeply localized and culturally attuned workforce.<sup>50</sup>
15. **Adaptability & Resilience:** Many green economy jobs, particularly in land management, conservation, and rural energy, involve working in remote and challenging field conditions. Job descriptions often seek candidates who are resilient, flexible, and able to solve problems independently in dynamic and

sometimes unpredictable environments.<sup>43</sup> Cross-cultural competence is also highly valued, given the need to work with diverse ethnic groups and international teams.

### 3.3 Educational and Professional Development Trajectories

The pathways into Ethiopia's green workforce are varied, reflecting the diversity of roles available. They range from formal university education to hands-on vocational training and independent, experience-based learning.

16. **Formal Qualifications:** A **Bachelor's degree** is the typical entry requirement for most professional roles. Common fields of study include Environmental Science, Engineering (Civil, Electrical, Mechanical, Water), Agriculture, Forestry, Economics, Sociology, and Development Studies. For more specialized, advisory, or senior management positions, a **Master's degree** is often mandatory. High-level expert roles, particularly with institutions like the World Bank, may require a PhD.<sup>42</sup>
17. **Vocational Training (TVET):** TVET institutions are the primary pipeline for the skilled technical workforce. They are crucial for developing practical competencies for occupations like **solar PV technicians, water pump mechanics, waste management operators, modern farm equipment operators, and sustainable agriculture practitioners**. There is a recognized need to strengthen the link between TVET curricula and market demand to ensure graduates have the right skills. Initiatives like the HaHuJobs TVET platform, which aims to trace graduates and connect them with employers, and the capacity-building support provided by partners like GIZ, are designed to bridge this gap.<sup>41</sup>
18. **Professional Certifications:** While not as commonly required as formal degrees, professional certifications can provide a significant competitive advantage. Certifications in **Project Management (e.g., PMP)** are highly valued for coordinator and manager roles. Specialized credentials in **GIS (e.g., GISP)**, environmental auditing (**e.g., Certified Environmental Auditor**), or specific standards like **ISO 14001** for environmental management systems can signal a high level of expertise.<sup>65</sup>
19. **Freelance & Self-Taught Pathways:** A growing ecosystem of independent



consultants and freelancers exists, particularly in fields like EIA, environmental writing, research, and data analysis. Professionals in this space often build their expertise through a portfolio of diverse project experiences rather than a linear career path. Digital platforms like Upwork and AfricaShore are key enablers, connecting Ethiopian experts with both local and international demand for their services and showcasing their project-based skills.<sup>61</sup>

**Table 2: Cross-Sectoral Analysis of High-Demand Competencies**

Competency Type	Specific Skill	Demand Level	Key Sectors Requiring Skill	Representative Job Titles
<b>Technical</b>	<b>GIS &amp; Remote Sensing</b>	High	Forestry, Agriculture, Water, Env. Monitoring, Climate Change	GIS Specialist, M&E Officer, Watershed Coordinator, Climate Risk Analyst
<b>Technical</b>	<b>Environmental Impact Assessment (EIA)</b>	High	Env. Policy, Green Buildings, Energy, Transport, Waste Mgt.	Environmental Officer, EIA Consultant, Environmental Specialist
<b>Technical</b>	<b>Project Management</b>	High	All sectors with donor funding	Project Coordinator, Program Manager, Sector Lead
<b>Technical</b>	<b>Solar PV Installation &amp; Maintenance</b>	Medium	Renewable Energy, Green Buildings	Solar Technician, Energy Specialist, Off-grid Solutions Officer
<b>Technical</b>	<b>Green/Climate Finance &amp; Carbon Accounting</b>	Medium (High Value)	Green Finance, Forestry (REDD+), Climate Change	Head of Green Financing, Carbon Project Developer, ESG

				Analyst
<b>Interpersonal</b>	<b>Community Facilitation &amp; Engagement</b>	High	Forestry, Agriculture, Water, Climate Adaptation, Waste Mgt.	Community Resilience Coordinator, Forestry Officer, EH Assistant
<b>Interpersonal</b>	<b>Stakeholder Engagement &amp; Partnership</b>	High	Env. Policy, Climate Change, Green Finance, All senior roles	Climate Change Advisor, Sector Lead, Program Director
<b>Interpersonal</b>	<b>Technical Report Writing</b>	High	All professional and technical roles	Environmental Specialist, Consultant, Analyst, Officer
<b>Interpersonal</b>	<b>Local Language Proficiency (Amharic, Oromo, etc.)</b>	High (for field roles)	Agriculture, Forestry, Water, Community-based projects	Livelihood Facilitator, Field Officer, Extension Worker
<b>Interpersonal</b>	<b>Adaptability &amp; Field Resilience</b>	Medium	Forestry, Water, Sustainable Tourism, Env. Monitoring	Field Coordinator, Wildlife Guide, Research Assistant

## Part IV: The Green Employment Market: Structures, Compensation, and Dynamics

The structure of Ethiopia's green employment market is as diverse as the sectors it encompasses. It is a mosaic of public sector institutions, international and local non-governmental organizations, a burgeoning private sector, and a significant informal economy. The nature of employment contracts and compensation levels varies dramatically across these different players.

## 4.1 The Employer Landscape

The green workforce is employed by a wide array of organizations, each with distinct mandates and hiring practices.

20. **Government Bodies:** These are foundational employers, primarily responsible for policy, regulation, research, and the management of large-scale national programs. Key entities include the **Ministry of Environment, Forest and Climate Change (MEFCC)**, the **Ministry of Agriculture**, regional environmental and agricultural bureaus, and specialized agencies like the **Ethiopian Energy Authority (EEA)**. State-owned enterprises, most notably **Ethiopian Electric Power (EEP)**, are major employers in the energy sector.<sup>15</sup> Government roles are typically permanent and offer long-term career structures.
21. **International & Local NGOs:** Non-governmental organizations are the primary implementers of on-the-ground, donor-funded projects. They are a major source of employment, particularly for mid-level and field-based positions. Prominent employers include large international NGOs like the **International Rescue Committee (IRC)**, **SOS Children's Villages**, and **World Vision**, as well as local organizations such as the **Ethiopian Wildlife and Natural History Society (EWNHS)** and **Forum on Sustainable Child Empowerment (FSCE)**.<sup>41</sup>
22. **Multilateral & Bilateral Agencies (Development Partners):** While not mass employers of the general workforce, these agencies hire a significant number of highly skilled national and international staff to manage their substantial financial and technical investments in Ethiopia. These roles—such as Senior Program Officer, Technical Advisor, or Project Manager—are highly sought after. Key players include the **World Bank**, **African Development Bank (AfDB)**, **United Nations Development Programme (UNDP)**, **GIZ**, and the **UN Economic Commission for Africa (UNECA)**.<sup>24</sup>
23. **Private Sector:** This is the most dynamic and rapidly growing segment of the employer landscape, though it is still developing. It includes:
  1. **Renewable Energy Companies:** Firms like **Toyo Solar** that import, assemble, and install solar products.<sup>74</sup>
  2. **Engineering & Environmental Consultancies:** Companies like **Metaferia Consulting Engineers** and **Motion Consultancy & Training** that provide specialized services such as EIA, feasibility studies, and engineering design.<sup>62</sup>
  3. **Green Finance:** An emerging area with financial institutions like **OLA Energy Ethiopia** creating dedicated green financing departments.<sup>45</sup>

4. **Manufacturing and Agribusiness:** Companies that are adopting sustainable practices and creating roles for environmental compliance and sustainable sourcing.
24. **Research & Academia:** Universities across the country, along with specialized research centers like the **International Livestock Research Institute (ILRI)**, employ researchers, lecturers, and consultants who contribute to policy analysis, technology development, and training.<sup>77</sup>

## 4.2 Contract Arrangements and Compensation Intelligence

The terms of employment in the green economy are highly variable, reflecting the different funding models and operational needs of employers.

25. **Full-Time Permanent:** This is the standard arrangement within government ministries and larger, established private sector companies. It offers the greatest job security and access to benefits like pensions and health insurance.
26. **Fixed-Term Contracts:** This is the dominant employment model within the NGO and development partner community. Contracts are tied directly to the duration of a specific project's funding cycle, which typically ranges from one to three years. While often well-compensated, these roles offer less long-term security and require professionals to move between projects.<sup>69</sup>
27. **Freelance/Consultancy:** This arrangement is common for individuals with highly specialized and in-demand expertise. Consultants are hired for short-term assignments to perform specific tasks, such as conducting a feasibility study, developing a training manual, or carrying out an EIA. They are typically paid a daily rate or a lump sum for the entire assignment. Platforms like Upwork and AfricaShore are facilitating the growth of this market segment.<sup>44</sup>
28. **Internships/Apprenticeships:** These are crucial entry points for recent graduates to gain practical experience. International organizations like the UN and various NGOs offer structured internship programs, which are often paid a monthly stipend to cover living costs.<sup>73</sup>
29. **Informal & Gig Work:** This category covers a vast number of people, particularly in the Green Legacy Initiative (seasonal nursery work) and informal waste collection. These arrangements are characterized by verbal agreements, payment on a piece-rate or daily basis, and a general lack of formal contracts,

benefits, or social protection.

Compensation levels are difficult to generalize due to the wide range of roles and employer types. However, analysis of available data from job advertisements, project documents, and consultancy databases allows for the estimation of typical ranges. Formal roles with international organizations and private consultancies tend to offer the highest compensation, followed by government positions. NGO salaries are competitive but can vary based on the donor. Stipends for internships are typically modest, designed to cover basic expenses. Freelance daily rates for experienced national consultants can be substantial, reflecting their specialized skills.

**Table 3: Typical Compensation Ranges by Role Category and Employment Type (Mid-2025 Estimates)**

Role Level (Experience)	Formal Employment (Annual Salary Range - ETB)	Freelance/Consultancy (Daily Rate Range - USD)	Internship/Volunteer (Monthly Stipend - ETB)	Data Source/Confidence Level
<b>Entry-Level (0-3 yrs)</b>	240,000 - 600,000	\$50 - \$120	5,000 - 15,000	Medium (Job Ads, NGO Scales)
<b>Mid-Career (4-10 yrs)</b>	600,000 - 1,500,000	\$120 - \$350	N/A	Medium (Job Ads, Project Docs)
<b>Senior Expert (10+ yrs)</b>	1,500,000 - 3,500,000+	\$350 - \$700+	N/A	High (Consultancy Databases, MDB Scales)

*Note: Ranges are indicative and can vary significantly based on the specific employer, location, and required specialization. USD rates for consultants are common for internationally funded projects.*

## **Part V: Regional Dimensions and Remote Work Opportunities**

The distribution of green employment in Ethiopia is not uniform; it is geographically concentrated based on ecological conditions, economic activities, and administrative functions. Understanding these regional patterns is essential for targeted workforce development and investment.

## 5.1 Geographic Distribution and Regional Hotspots

Different regions of Ethiopia have become hubs for specific types of green economy activities, creating distinct local labor markets.

30. **Addis Ababa:** As the nation's capital and administrative center, Addis Ababa is the undisputed hub for high-level policy, governance, and finance-related green jobs. It hosts the headquarters of key federal ministries (MEFCC, MoF), the UNECA, the African Union, and the country offices of nearly all major international development partners and NGOs. Consequently, there is a high concentration of roles in **Environmental Policy, Green Finance, Program Management, and senior advisory positions**. The city is also a center for environmental consulting firms and green-tech startups.<sup>45</sup>
31. **Oromia:** As the country's largest and most populous region with vast agricultural land and significant forest resources, Oromia is a primary center for employment in **Sustainable Agriculture, Agroecology, and Forestry**. It is a key implementation area for the Oromia Forested Landscape Program (OFLP), which focuses on REDD+ and carbon finance.<sup>53</sup> The region is also a focus for the development of industrial parks, where there is growing attention to implementing green standards for waste management and energy use.<sup>28</sup>
32. **Amhara:** The Amhara region, characterized by its highland topography and its centrality to the Blue Nile basin, is a major hotspot for projects related to **Watershed Management, Soil and Water Conservation, and Land Rehabilitation**. Large-scale programs like the World Bank-supported SLMP and RLLP have historically had a strong presence here, creating numerous jobs in landscape restoration and community-based natural resource management.<sup>25</sup>
33. **Southern Nations, Nationalities, and Peoples' Region (SNNPR):** This region is renowned for its rich biodiversity and unique ecosystems. As a result, green employment opportunities are concentrated in **Biodiversity Conservation, Protected Area Management, and Eco-Tourism**. It is also a key area for

projects focused on developing sustainable value chains for high-value agricultural products like coffee and spices, often with a focus on forest conservation.<sup>72</sup>

34. **Somali Region:** In this arid and semi-arid region, green job opportunities are increasingly focused on **Climate Change Adaptation, Drought Resilience, and Livelihood Diversification** for pastoralist communities. There is also an emerging focus on identifying viable **Circular Economy** initiatives that are appropriate for the local context, such as managing agricultural waste or creating value from local resources.<sup>37</sup>
35. **Tigray:** While recent conflict has disrupted development activities, the future focus for green employment in Tigray will undoubtedly be on **Environmental Restoration and Rehabilitation**. This will require a massive effort and a workforce skilled in post-conflict landscape recovery, rebuilding sustainable agricultural systems, and restoring essential environmental services.

## 5.2 Remote Work and Global Opportunities

The COVID-19 pandemic accelerated a global trend towards remote work, and while many green jobs in Ethiopia are field-based and require a physical presence, a growing number of roles can be performed remotely. This creates new opportunities for Ethiopian professionals to work on national or even international projects without being based in Addis Ababa.

The roles with the highest potential for remote work are those that are knowledge-based and data-driven. These include:

- **GIS and Data Analysis:** A GIS specialist can process satellite imagery and create maps for a project in any region from a computer anywhere in the country.
- **Environmental Research and Writing:** Consultants hired to write policy briefs, research papers, or project proposals can often do so remotely.
- **Carbon Accounting and MRV:** The technical work of calculating carbon balances and preparing reports for carbon offset projects is largely desk-based.
- **Project Management and Coordination:** While some face-to-face interaction is necessary, many day-to-day project management tasks, such as reporting, budget tracking, and virtual team coordination, can be done remotely.



This trend is enabled by the proliferation of digital freelance platforms. International platforms like **Upwork** <sup>68</sup> and regionally-focused ones like

**AfricaShore** <sup>61</sup> provide a marketplace where Ethiopian consultants can offer their services to a global client base. These platforms showcase a range of skills, from EIA and sustainability reporting to climate science and environmental law, demonstrating the capacity of Ethiopian professionals to compete in a digital, location-independent job market. This opens up new income streams and facilitates knowledge transfer, further strengthening the domestic green workforce.

## **Part VI: Strategic Outlook and Recommendations for Workforce Development**

The analysis of Ethiopia's green economy reveals a sector brimming with potential but also facing significant challenges in building a workforce that can meet the demands of its ambitious national strategy. This concluding section synthesizes the key findings to provide a forward-looking outlook and offers targeted, actionable recommendations for government, educational institutions, and development partners to strategically build the human capital required for a sustainable future.

### **6.1 Synthesis: Growth Areas, Skills Gaps, and Future Trajectories**

The green job market in Ethiopia is not static; it is evolving rapidly in response to policy shifts, technological advancements, and new investment flows. Several key growth areas and corresponding skills gaps are evident.

#### **Identified Growth Areas:**

- **Circular Economy & Waste Valorization:** Previously a niche area, the circular economy is now a strategic priority, driven by the development of a National Circular Economy Roadmap with AfDB support and a growing number of SME-focused projects.<sup>31</sup> This will create a new wave of jobs in recycling, composting, waste-to-energy, and the design of products for reuse and repair.

- **Climate Finance & Carbon Markets:** This is arguably the most critical high-value growth area. As Ethiopia seeks to bridge its massive CRGE funding gap, the ability to access international climate finance is paramount. This will drive strong demand for a small but highly skilled cadre of professionals in green finance, carbon project development (especially under REDD+), and the technical work of Monitoring, Reporting, and Verification (MRV).<sup>24</sup>
- **Off-Grid Renewable Energy:** The national push for universal electricity access, particularly in rural areas, will continue to fuel demand for decentralized energy solutions. This translates into sustained job growth for solar technicians, sales agents for solar home systems, and managers for community-owned mini-grids.<sup>39</sup>
- **Digital & Green-Tech Integration:** The future of environmental management is digital. Roles that combine environmental science with advanced digital skills—such as GIS, remote sensing, IoT for environmental monitoring, and drone-based surveys—will become increasingly essential for efficiency, accuracy, and scale in all green sectors.

#### Identified Skills Gaps:

- **Mid-Level Project Management:** A significant gap exists between senior-level experts (many of whom are international consultants) and junior field staff. There is a critical shortage of experienced **Ethiopian Project Managers** who possess the hybrid skillset needed to manage complex, multi-stakeholder green projects, including financial management, M&E, and stakeholder engagement.
- **Certified Vocational & Technical Skills:** While TVETs produce many graduates, there is a persistent gap in the availability of technicians with certified, high-quality, and up-to-date skills in areas like advanced solar PV installation and troubleshooting, modern irrigation system maintenance, and the operation of specialized waste processing machinery.
- **Specialized Green Finance Expertise:** This is the most acute high-value skills gap. The country currently lacks a sufficient pool of professionals with expertise in the complex fields of financial modeling for green investments, structuring green bonds, and navigating international carbon market transactions.

## 6.2 Recommendations for Educational & TVET Institutions

To align the supply of skills with market demand, educational and vocational institutions must become more agile and responsive.

- **Curriculum Modernization:** Universities should integrate practical, market-relevant modules into existing degree programs. For example, Environmental Science programs should include mandatory courses in **GIS and EIA**. Business and Economics programs should offer specializations in **Sustainable Finance and Circular Economy Business Models**. Engineering programs should incorporate principles of **Renewable Energy Systems Design and Green Building**.
- **Develop Short-Term Certification Programs:** To quickly fill technical skills gaps, TVET colleges and universities should partner with industry to create targeted, 3-to-6-month certification programs. These could include credentials like **Certified Solar PV Installer, Certified Energy Auditor, or Certified Waste Recycling Operations Manager**. These programs would be ideal for upskilling existing workers and providing recent graduates with a practical, in-demand qualification.
- **Strengthen Industry Linkages:** Educational institutions must move beyond purely academic training. This requires establishing **mandatory internship programs** with private companies, NGOs, and government agencies in the green sector. Creating formal partnerships for guest lectures, curriculum advisory boards, and collaborative research projects will ensure that training remains grounded in real-world needs. Platforms like **HaHuJobs TVET** should be leveraged to create a feedback loop, tracking graduate employment outcomes and using employer feedback to refine curricula.<sup>66</sup>

### 6.3 Policy Recommendations for Government & Development Partners

Policy and investment must be strategically directed to build a robust and resilient national green workforce.

- **Professionalize the Green Legacy Workforce:** The GLI has been a resounding success in mass job creation, but the roles are largely temporary. The government, with support from partners, should develop a clear strategy to **transition this workforce into more permanent, skilled roles**. This can be achieved by linking tree planting to long-term sustainable forest management,

developing agroforestry value chains (for honey, timber, fruits, and spices <sup>13</sup>), and training community members to participate in forest carbon monitoring for REDD+ projects. Providing formal training and certification in areas like nursery management, silviculture, and forest inventory can create clear career pathways.

- **Invest in Mid-Level Management Capacity:** Development partners should fund dedicated leadership and project management training programs tailored to the green economy. The goal should be to build a strong pipeline of Ethiopian managers who can successfully lead complex, multi-million-dollar projects, reducing the reliance on international experts and building sustainable local capacity.
- **Standardize and Certify Green Skills:** The government, through the Ethiopian Federal TVET Agency, should work with industry stakeholders to develop and implement **National Occupational Standards (NOS)** and a formal certification system for key green jobs. This will guarantee a benchmark of quality, improve labor market signaling, enhance worker mobility, and provide individuals with nationally recognized credentials that form the basis of a professional career.
- **Incentivize Private Sector Hiring and Training:** To shift the employment burden from the public and donor sectors, the government should use its new **Green Taxonomy** <sup>24</sup> as a tool to incentivize private sector action. This could involve offering preferential loan terms, tax breaks, or priority access to foreign exchange for companies that can demonstrate they are hiring and providing high-quality training to local workers in certified green roles. This would create a powerful market-based pull for skills development and help ensure the long-term financial sustainability of the green workforce.

**Table 4: Strategic Recommendations Matrix**

Identified Gap/Opportunity	Recommended Action	Lead Actor(s)	Key Performance Indicator (KPI) for Success
<b>Shortage of Certified Solar Technicians</b>	Develop and launch a national certification program for solar PV installation and maintenance at TVET colleges.	Ministry of Education, TVET Agency, EEA, Private Solar Companies	Number of certified solar technicians graduating annually; Employer satisfaction rate with graduate skills.

<b>Lack of Career Path for GLI Workers</b>	Design and fund programs to train GLI nursery workers in advanced agroforestry, sustainable forest management, and carbon monitoring.	MEFCC, Regional Agriculture Bureaus, Development Partners (e.g., World Bank)	Percentage of GLI workers transitioned to permanent roles or SME ownership in forest value chains within 3 years.
<b>Critical Shortage of Green Finance Expertise</b>	Establish a Green Finance Centre of Excellence at a leading university (e.g., Addis Ababa University) to offer Master's programs and professional training.	Ministry of Finance, National Bank of Ethiopia, Development Partners (e.g., EIB, UNDP)	Number of graduates with MSc in Green Finance; Number of green bonds/climate finance deals structured by local experts.
<b>Gap in Mid-Level Project Management Skills</b>	Create a "Green Project Management" leadership program for mid-career professionals, funded by a consortium of donors.	Development Partners (UNDP, GIZ), Ethiopian Management Institute	Number of certified Green Project Managers leading major projects; Reduction in reliance on international project managers.
<b>Need for Market-Relevant TVET Curricula</b>	Establish formal Sector Skills Councils for key green industries (Renewable Energy, Waste Management) to directly inform and approve TVET curricula.	TVET Agency, Private Sector Associations, Line Ministries	Percentage of TVET green skills curricula co-designed and approved by industry partners.
<b>Untapped Private Sector Employment Potential</b>	Provide targeted financial incentives (e.g., tax credits, access to finance) for private firms that invest in certified green skills training	Ministry of Finance, Ethiopian Investment Commission, Commercial Banks	Increase in private sector expenditure on formal green skills training; Number of new certified green jobs created in the private sector.

	for their employees.		
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# Ethiopia's Iron Economy: A Comprehensive Employment Map for National Industrial Strategy (Mid-2025)

## Part I: The State of Ethiopia's Iron Economy in 2025

### 1.1. An Integrated Overview: The Industrial-Infrastructural Nexus

Ethiopia's ambition for profound economic transformation is anchored in the development of its "Iron Economy"—a synergistic nexus of manufacturing, construction, and logistics. An analysis of this ecosystem reveals that these sectors are not independent pillars but are deeply intertwined, forming a critical, interdependent system where the progress of one is contingent upon the capabilities of the others. As of mid-2025, understanding this integrated dynamic is fundamental to formulating effective national industrial and workforce policies. The country's strategic documents, particularly the Ministry of Transport and Logistics (MoTL) 10-Year Perspective Plan (2020-2030), explicitly frame infrastructure development as the primary enabler for facilitating growth in industry, agriculture, and trade.<sup>1</sup> This vision moves beyond viewing infrastructure as a standalone objective and positions it as a service to the productive sectors of the economy.

The relationship between these sectors is cyclical and mutually reinforcing. The growth of the manufacturing sector, a cornerstone of Ethiopia's export and import-substitution strategy, is fundamentally dependent on the other two pillars. Efficient logistics are required for the timely and cost-effective importation of raw materials and capital goods, as well as for the export of finished products to global markets.<sup>2</sup> Concurrently, the expansion of manufacturing capacity necessitates the construction of new factories, warehouses, and specialized facilities, such as those found in the

nation's burgeoning industrial parks.<sup>3</sup> The World Bank has identified poor trade logistics and inadequate infrastructure as binding constraints that have historically throttled the potential of Ethiopian manufacturing, making investments in these areas a prerequisite for industrial success.<sup>4</sup>

Conversely, the construction sector, fueled by massive public and private investment, creates significant downstream demand for the manufacturing sector. Large-scale infrastructure projects require vast quantities of locally produced inputs such as steel, cement, electrical cables, and transformers, thereby stimulating domestic industrial activity.<sup>5</sup> This linkage is a core component of the government's import substitution policy, aimed at reducing foreign exchange expenditure and building local industrial capacity. The construction of roads, railways, and ports, in turn, enhances the efficiency of the logistics network, which benefits all sectors.

Recent government initiatives underscore this integrated approach. Efforts to modernize the logistics sector and address the nation's persistent trade imbalance are explicitly designed to support the manufacturing and export sectors.<sup>6</sup> The development of industrial parks is strategically linked to infrastructure readiness, with access to reliable transport networks being a key selling point for attracting foreign direct investment (FDI).<sup>3</sup> However, analysis from domestic observers highlights critical weaknesses in these linkages. For instance, the reliance on imported intermediate goods, even for simple items like buttons and zippers for the garment industry, coupled with logistics and bureaucratic hurdles, inflates production costs and severely undermines the international competitiveness of Ethiopian products.<sup>2</sup> Therefore, mapping the employment landscape of the Iron Economy requires a holistic perspective that recognizes these intricate dependencies. Workforce planning cannot succeed in a silo; a skilled construction workforce is needed to build the factories, a productive manufacturing workforce is needed to produce the goods, and an efficient logistics workforce is needed to move materials and products between them and to the world.

## **1.2. Contribution to National Development Goals**

The performance of the Iron Economy is the primary determinant of Ethiopia's success in achieving its overarching national development goals, including the vision

to attain lower-middle-income country status by 2025 and the ambitious targets set forth in the Ten-Year Development Plan (2021-2030). As of mid-2025, the landscape presents a complex and often paradoxical picture, characterized by impressive headline growth figures coexisting with deep-seated structural challenges that impede the desired economic transformation.

For over a decade, Ethiopia has been lauded as one of the world's fastest-growing economies, a trajectory largely propelled by massive state-led investment in infrastructure.<sup>7</sup> The industrial sector has been a significant engine of this growth, expanding by 9.2 percent and contributing to a real GDP growth rate of 8.1 percent in 2024.<sup>9</sup> This investment has yielded tangible improvements in living standards, including expanded access to water and electricity.<sup>8</sup> However, this growth has not yet translated into the profound structural transformation envisioned by policymakers. The central paradox of Ethiopia's development story is the disconnect between investment-led growth and a corresponding shift in the structure of the economy and its workforce.

Despite the policy emphasis on industrialization, the manufacturing sector's role remains marginal. Its share of GDP has been volatile and, in some recent years, has even declined, falling from 5.9 percent in 2019 to 4.4 percent in 2022.<sup>10</sup> This performance falls far short of the strategic goal to increase the manufacturing sector's share of GDP to 17 percent by 2025.<sup>12</sup> More critically, the economy has struggled to pull labor out of low-productivity agriculture into more productive industrial employment. Agriculture continues to employ the vast majority of the workforce, while manufacturing's share of employment remains in the single digits.<sup>4</sup> This indicates that while the country is building the physical capital for industrialization, the human capital and economic structures have been slower to adapt.

Recent data from 2023 and mid-2025 suggests a potential turning point, possibly driven by macroeconomic reforms. Manufacturing output saw a remarkable 36.38 percent increase in 2023, reaching USD 7.33 billion after a decline in 2021.<sup>15</sup> Reports from the Ministry of Industry in mid-2025 claim that recent reforms, particularly those improving access to foreign exchange, have revitalized the sector, boosting overall production capacity from 46 percent to over 60 percent.<sup>5</sup> This surge, if sustained, could signal that the government is beginning to address the core operational bottlenecks that have long constrained the sector.



This progress is set against the backdrop of a severe and persistent trade imbalance, which reached USD 14 billion in 2022.<sup>10</sup> This deficit underscores the critical importance of the Iron Economy's performance. The success of export-oriented manufacturing and the deepening of import substitution capabilities are not merely policy preferences but economic imperatives for achieving macroeconomic stability. The ability of the Iron Economy to generate skilled, well-paying jobs, absorb the country's large and growing youth population, and drive export earnings will ultimately determine whether Ethiopia can achieve its vision of sustainable and inclusive prosperity.

### 1.3. The Institutional and Policy Ecosystem

The functioning of Ethiopia's Iron Economy and its labor market is governed by a complex and multifaceted ecosystem of institutions. This includes government ministries with distinct mandates, powerful state-owned enterprises, a growing network of private sector associations, and influential international development partners. The effectiveness of national workforce planning and industrial development hinges on the alignment and coordination among these diverse actors.

**Government Bodies:** At the apex of the policy framework are several key ministries. The **Ministry of Industry (MoI)** is the primary architect of industrial policy, with a mandate focused on increasing production and productivity, enhancing technology utilization, boosting exports, and promoting import substitution.<sup>5</sup> It publicly acknowledges the severe constraints facing the sector, such as chronic foreign exchange shortages, limited access to finance, and the closure of hundreds of firms in recent years.<sup>10</sup> The

**Ministry of Transport and Logistics (MoTL)** is responsible for the physical integration of the economy. Its 10-Year Perspective Plan and recent digital transformation initiatives are designed to modernize the nation's road, rail, and logistics networks to support industrial and trade growth.<sup>1</sup> The

**Ministry of Labor and Skills (MoLS)**, established under Proclamation No. 1263/2022, holds the critical mandate of harmonizing labor market supply and demand.<sup>19</sup> It oversees the Technical and Vocational Education and Training (TVET) system and spearheads national job creation strategies, including the innovative concept of

zoning economic corridors to align skills development with regional resource endowments.<sup>20</sup>

Supporting these ministries are key agencies and corporations. The **Ethiopian Investment Commission (EIC)** is the lead agency for attracting FDI and managing the country's industrial parks (IPs). In a significant policy move in late 2024, the EIC designated 10 of the 13 state-managed IPs as Special Economic Zones (SEZs), a measure intended to enhance their regulatory environment and attractiveness to investors.<sup>7</sup> In the construction sector, the

**Ethiopian Construction Authority (ECA)** acts as the industry regulator, tasked with ensuring that projects adhere to standards of quality, timeliness, and cost-effectiveness<sup>22</sup>, while state-owned enterprises like the

**Ethiopian Construction Works Corporation** execute major public projects.<sup>23</sup>

**Private Sector Associations:** The private sector is increasingly organized and vocal. The **Ethiopian Chamber of Commerce and Sectoral Associations (ECCSA)** serves as the umbrella organization representing the interests of the entire business community through advocacy, networking, and capacity-building initiatives.<sup>24</sup> Beneath this umbrella, specialized sectoral associations play a crucial role in their respective industries. These include the

**Ethiopian Textile and Garment Manufacturers' Association (ETGAMA)**<sup>26</sup>, the

**Ethiopian Leather Industries Association (ELIA)**<sup>28</sup>, the

**Construction Contractors Association of Ethiopia (CCAEE)**<sup>30</sup>, the

**Ethiopian Construction Technology and Management Professionals Association (ECoTMPA)**<sup>31</sup>, and the

**Ethiopian Freight Forwarders and Shipping Agents Association (EFFSAA)**.<sup>32</sup>

These bodies are vital for setting industry standards, providing specialized training, and engaging in policy dialogue with the government.

**Development Partners:** Ethiopia's industrialization drive is heavily supported by international partners. The **World Bank**, the **African Development Bank (AfDB)**, the **United Nations Development Programme (UNDP)**, and Germany's **Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)** are prominent actors. They

provide critical financing for major infrastructure projects <sup>34</sup>, offer technical assistance for the formulation of industrial policy <sup>4</sup>, and are deeply involved in supporting the reform of the TVET system to address the persistent skills gap.<sup>37</sup>

The intricate division of labor among these institutions highlights a significant governance challenge. While each body has a clear mandate, the problems facing the Iron Economy—such as a skills deficit that hampers manufacturing productivity—are systemic and cut across institutional boundaries. A manufacturer's struggle to compete globally may stem from a lack of skilled labor (MoLS domain), high transport costs (MoTL domain), and unreliable input supply (Mol domain). This fragmentation necessitates robust inter-agency coordination. The existence of platforms like the National Logistics Council <sup>32</sup> and partnership programs like GIZ's STEP <sup>37</sup> are positive steps toward bridging these institutional silos, but their scale and impact relative to the magnitude of the challenges remain a key question for policymakers.

## **Part II: The Manufacturing Sector Workforce**

The manufacturing sector is the centerpiece of Ethiopia's strategy for structural transformation. Its workforce is diverse, spanning a range of sub-sectors with distinct employment profiles, skill requirements, and geographic concentrations. A detailed mapping of this workforce reveals a sector of immense potential but also one defined by significant human capital challenges that constrain its growth and productivity.

### **2.1. Sub-Sector Employment Profiles**

#### **2.1.1. Textiles, Garments, and Leather: The Engine of Mass Employment**

The textiles, garments, and leather sub-sector represents the vanguard of Ethiopia's export-oriented industrialization strategy. Concentrated heavily within the nation's

industrial parks, this sector is the primary engine of large-scale, formal job creation, particularly for Ethiopia's young female population. Industrial Parks in Hawassa, Bole Lemi, and Kombolcha are specialized hubs for textile and garment production, attracting significant foreign direct investment from global players.<sup>39</sup> These parks have collectively created over 150,000 jobs, fundamentally altering the local economic landscape.<sup>10</sup> The demographic profile of this workforce is strikingly uniform; in factories participating in the Better Work program, an estimated 85 percent of workers are women, a figure mirrored in specific World Bank-supported projects where female employment reached 89 percent.<sup>36</sup>

Job roles within this sub-sector span the full production and management hierarchy. At the entry-level, demand is high for production line workers such as Seamstresses and Fabric Cutters.<sup>43</sup> Further up the value chain, companies like Minaye PLC advertise for

Assembly Officers to coordinate furniture operations, while Habte Garment & Printing seeks creative talent for roles like Junior Graphic Designer.<sup>44</sup> These positions are supported by a range of technical and administrative staff.

Despite its success in job creation, the sector is characterized by significant vulnerabilities. Its heavy reliance on the U.S. market made it particularly susceptible to the suspension of the African Growth and Opportunity Act (AGOA) trade preferences, which resulted in factory closures and substantial job losses, highlighting the risks of dependence on a single market and policy instrument.<sup>39</sup> Internally, the most pressing challenge is the exceptionally high rate of worker turnover. This is driven by a combination of low wages and difficult living conditions for the largely migrant workforce, which undermines firm productivity and the development of a stable, skilled labor pool.<sup>36</sup> Furthermore, the sector's integration with the domestic economy remains weak. Most firms rely heavily on imported inputs for everything from high-value fabrics to basic components like buttons, limiting domestic value addition and creating logistical bottlenecks.<sup>2</sup> Sectoral associations like the Ethiopian Textile and Garment Manufacturers' Association (ETGAMA) and the Ethiopian Leather Industries Association (ELIA) are actively working to address these challenges by building local capacity, fostering market linkages, and advocating for supportive policies.<sup>28</sup>

### **2.1.2. Agro-Processing (Food & Beverage): The Link to the Agrarian Economy**

The agro-processing sub-sector, encompassing food and beverage production, stands as the largest and most established segment of Ethiopia's manufacturing industry.<sup>10</sup> It holds immense strategic importance due to its potential to create value from the country's vast agricultural resources, substitute for costly imports, and forge critical economic linkages between the rural agrarian economy and urban industrial centers. The market is substantial and growing, driven by a large population and increasing urbanization. However, Ethiopia remains a significant importer of processed food products, presenting a vast opportunity for domestic firms to expand and capture local market share in products like edible oils, pasta, and fruit juices.<sup>47</sup>

Employment in this sub-sector is diverse and spans a wide range of skill levels. Major domestic and multinational companies such as BGI Ethiopia, NIB CANDY FACTORY PLC, and Addis Ababa Bottle And Glass SC are significant employers.<sup>44</sup> On the factory floor, there is a consistent demand for

Production Operators and technically skilled professionals like Chemists to ensure quality control from raw material to final product.<sup>44</sup> The management and operational tiers require experienced professionals for roles such as

National Warehouse Manager to oversee complex logistics and Manufacturing Sector Manager to provide strategic leadership and ensure cost-effective production in line with sales and operations planning (S&OP).<sup>44</sup>

Recognizing the critical need to strengthen the link between farms and factories, the government has launched a flagship initiative to develop Integrated Agro-Industrial Parks (IAIPs). Parks in Yirgalem, Burie, and Bulbula are designed as specialized hubs for agro-processing, strategically located to source raw materials efficiently through a network of associated Rural Transformation Centers (RTCs).<sup>50</sup> This policy is a direct attempt to overcome the raw material supply constraints that have historically plagued the industry. The employment impact of these parks is already tangible; the Yirgalem IAIP, for example, has created economic opportunities for over 16,000 people within its supply chain, including youth engaged in seedling preparation for local farmers.<sup>51</sup> This model represents a crucial pathway for creating off-farm employment and modernizing the agricultural value chain.

### **2.1.3. Metal, Engineering, and Automotive Assembly: The Demand for Technical Skills**

The metal, engineering, and automotive assembly sub-sector forms the backbone of Ethiopia's industrial and infrastructural development. It is a critical sector for import substitution, providing essential capital goods, construction materials, and transport equipment that would otherwise need to be purchased with scarce foreign currency. This sub-sector is indicative of a country's deepening industrial capabilities, as it demands a significantly higher level of technical and engineering expertise compared to light manufacturing. Recent macroeconomic reforms have reportedly boosted local production of key infrastructure components, such as electrical poles, cables, and transformers, which are now being used in major public projects.<sup>5</sup>

The range of products manufactured locally is expanding and includes foundational materials like steel rebar and profiles, as well as more complex assembled goods like trailers, cargo trucks, and even motorcycles.<sup>11</sup> The employers in this space are a mix of large construction firms with in-house production units, like ASER Construction which produces tiles and terrazzo, and specialized manufacturing companies such as Abyssinia Integrated Steel, SOTEN Industrial Engineering PLC, and N.A Metal Industry & Engineering.<sup>52</sup>

The employment profile of this sub-sector is heavily weighted towards technical and vocational skills. Job advertisements consistently call for Senior Mechanics, Welders, Machine Operators, and Trainee/Junior Engineers.<sup>52</sup> The required qualifications are specific, with employers seeking candidates with Bachelor of Science degrees in Mechanical or Electrical Engineering for engineering roles, and TVET diplomas (Level III, IV, or V) in fields like General Mechanics, Machining, or General Metal Fabrication & Assembly for technician and operator positions.<sup>44</sup> This clear demand for certified technical skills underscores the vital role of the TVET system in supplying the human capital needed to sustain and expand this crucial industrial sub-sector.

### **2.1.4. Chemicals and Pharmaceuticals: A Nascent, High-Skill Sector**

The chemicals and pharmaceuticals sub-sector in Ethiopia is a nascent but

strategically vital component of the manufacturing landscape. While smaller in scale and employment compared to other sub-sectors, it represents the higher end of the industrial skills spectrum and is crucial for national health security and reducing reliance on imported medicines. The government has identified pharmaceuticals as a priority industry, with development in specialized industrial parks aimed at attracting investment in this high-value area.<sup>3</sup>

Key employers in this field include established domestic firms like the Ethiopian Pharmaceutical Manufacturing Share Company (EPHARM) and Addis Pharmaceutical Factory, alongside international joint ventures such as Julphar Pharmaceuticals PLC.<sup>59</sup> EPHARM, a pioneer in the industry, operates multiple production lines for various dosage forms and is planning a significant expansion with a new, state-of-the-art factory, signaling strong growth ambitions and future demand for a highly skilled workforce.<sup>60</sup>

Employment in this sub-sector is knowledge-intensive and requires advanced qualifications. The core professional roles are for university-educated specialists. Job postings from companies like Addis Pharmaceutical Factory show demand for Pharmacists, Chemists, Regulatory Affairs Experts, and specialized engineers such as Electrical Engineers to manage and maintain sophisticated production equipment.<sup>44</sup> The operational side also requires skilled technicians, with companies like Julphar hiring

Machine Operators who possess TVET diplomas in technical fields and experience in a regulated manufacturing environment.<sup>59</sup> The development of this sub-sector is thus heavily dependent on the country's ability to produce and retain a cadre of highly educated scientists and engineers, making the quality of higher education a critical success factor.

## **2.2. Geographic Distribution of Manufacturing Employment**

The geography of manufacturing employment in Ethiopia is characterized by intense concentration. The vast majority of industrial activity and associated job opportunities are clustered in a few key economic zones, primarily in and around the capital, Addis Ababa, and within the expanding network of government-developed industrial parks. This spatial pattern has profound implications for regional development, labor



migration, and the equitable distribution of economic opportunities.

Addis Ababa and its surrounding periphery—including industrial towns like Dukem, Bishoftu, and Adama—form the undisputed core of Ethiopia's manufacturing landscape. An analysis of online job portals reveals that an overwhelming proportion of vacancies in manufacturing, from management to production, are located within this central corridor.<sup>44</sup> This concentration is a legacy of historical development patterns and is reinforced by the region's superior infrastructure, larger market, and greater access to finance and skilled labor.

The government's industrial park program represents the most significant and deliberate effort to shape the country's industrial geography. These parks are designed to be self-contained ecosystems of production and have become major poles of employment growth. Parks such as Hawassa, Bole Lemi (in Addis Ababa), Kombolcha, and Mekelle were established as focal points to attract FDI and create mass employment, primarily in the textile and garment sectors.<sup>21</sup> The scale of this employment concentration is stark: the Hawassa Industrial Park alone employs over 33,000 workers, with an estimated 91 percent of them being migrants who have moved to the city specifically for these jobs.<sup>65</sup> This demonstrates the immense power of IPs to create jobs but also highlights the associated challenge of managing large-scale rural-to-urban migration and its pressure on urban housing and social services.

In response to these regional disparities, national policy is increasingly focused on decentralizing industrial development. The Ministry of Labor and Skills' strategy of "zoning" economic corridors is a direct attempt to align regional industrial development with local resource endowments and create employment opportunities closer to rural populations.<sup>20</sup> This policy aims to curb the flow of migration to major urban centers by fostering industrial growth in other regions. The establishment of Integrated Agro-Industrial Parks (IAIPs) in regional states—such as Burie in Amhara, Bulbula in Oromia, and Yirgalem in Sidama—is the most concrete manifestation of this strategy.<sup>50</sup> By locating processing facilities closer to agricultural production zones, the government aims to create a more geographically balanced industrial footprint and spread the benefits of industrialization more widely across the nation.

### **2.3. Occupational Structure and Skills Landscape**

The workforce of Ethiopia's manufacturing sector is defined by a distinct pyramidal structure and, most critically, by a pervasive and well-documented skills mismatch that acts as a primary brake on productivity, technology absorption, and overall industrial growth. At the base of the pyramid is a large and growing cohort of low-skilled operators, particularly in labor-intensive industries like garments. The middle layer consists of a thinner band of technicians, skilled tradespeople, and line supervisors. At the apex is a critically scarce group of experienced senior managers, industrial engineers, and technical experts capable of driving innovation and operational excellence.

Demand signals from the labor market, captured through online job advertisements, clearly illustrate this structure. There is a high volume of openings for entry-level roles like Production Operator and Assembly Officer.<sup>44</sup> Moving up, there is consistent demand for individuals with vocational training, such as

Technicians and Foremen.<sup>66</sup> At the highest level, companies are actively recruiting for strategic roles like

Manufacturing Manager, Production and Technic Manager, and Supply Chain Manager.<sup>49</sup>

The central challenge lies in the gap between the supply of labor from the education system and the specific needs of these roles. This "skills gap" is a persistent theme in analyses of the Ethiopian economy. Employers across the manufacturing sector consistently report that graduates from both universities and TVET colleges lack the practical, hands-on skills required for the modern workplace.<sup>4</sup> This issue is not confined to one level; it affects the employability of both TVET graduates seeking technician roles and university-educated engineers who often lack practical experience.<sup>70</sup>

The deficit is particularly acute at the managerial and engineering levels. The detailed job descriptions for management positions emphasize a sophisticated skill set that includes process optimization, cost control, quality assurance systems (like HACCP), and integrated business planning (S&OP)—competencies that are essential for improving productivity and competitiveness.<sup>49</sup> The scarcity of local talent with these modern management skills represents a major bottleneck, hindering the ability of Ethiopian firms to absorb new technologies and achieve higher levels of efficiency.<sup>2</sup>

The Ethiopian government and its international partners have recognized this human

capital deficit as a critical constraint. The TVET system is undergoing a significant overhaul, spearheaded by the Ministry of Labor and Skills with support from partners like GIZ through the Sustainable Training and Education Programme (STEP). The core objective of this reform is to make vocational training more demand-driven by strengthening cooperative (work-based) training, updating curricula in close partnership with the private sector, and improving the overall quality and relevance of the skills provided.<sup>37</sup> Institutions like the Federal TVET Institute are central to this effort, offering specialized programs in areas like Manufacturing Technology, designed specifically to produce the skilled technicians and technologists that industries require.<sup>73</sup> The success of these reforms in closing the skills gap will be a key determinant of the manufacturing sector's future trajectory.

To provide a granular view for workforce planners, the following table synthesizes data from job advertisements and sectoral reports, mapping key occupations to their required qualifications and prevailing salary ranges.

**Table 2.1: Occupational and Skills Profile of the Ethiopian Manufacturing Sector (Mid-2025)**

Sub-Sector	Job Title/Tier	Typical Education Requirement	Key Skills Demanded (from Job Ads)	Reported Monthly Salary Range (ETB)	Key Employers (Examples)
<b>Garments/Textiles</b>	Operator	Basic Literacy / Short-term Training	Sewing, Cutting, Packing, Attention to Detail	750 - 4,500	Foreign firms in IPs (e.g., PVH, Epic Group), Habte Garment
<b>Garments/Textiles</b>	Technician/Supervisor	TVET Diploma (Levels III-V)	Machine Maintenance, Quality Control, Team Supervision	4,000 - 10,000	Best Corporation, Jay Jay Mills, Local Factories
<b>Garments/Textiles</b>	Manager	Bachelor's/Master's	Production Planning, HR	15,000 - 50,000+	All major IP tenants,

		Degree	Management , Export Logistics, Compliance		Domestic Conglomerates
<b>Food &amp; Beverage</b>	Production Operator	TVET Diploma (Levels II-IV)	Machine Operation, Food Safety (HACCP), Hygiene	3,500 - 8,000	BGI Ethiopia, NIB CANDY FACTORY, Addis Ababa Bottle & Glass
<b>Food &amp; Beverage</b>	Chemist/Quality Control	BSc in Chemistry/Food Science	Laboratory Analysis, Physico-chemical Testing, Compliance	8,000 - 20,000	BGI Ethiopia, Julphar Pharmaceuticals
<b>Food &amp; Beverage</b>	Sector/Plant Manager	BSc/MSc in Engineering/Business	S&OP, Budget Management , Maintenance Planning, Leadership	25,000 - 70,000+	HANDTECH Group, Horra Corporate Group, BGI Ethiopia
<b>Metal/Engineering</b>	Welder/Machinist	TVET Certificate/Diploma	Specific Welding Techniques (e.g., food-grade), Machine Setup	4,500 - 12,000	BGI Ethiopia, Local Fabrication Shops
<b>Metal/Engineering</b>	Machine Operator	TVET Diploma (Levels III-IV)	CNC Operation, General Mechanics, Metal Fabrication	4,000 - 10,000	ASER Construction , Abyssinia Integrated Steel, Julphar
<b>Metal/Engineering</b>	Mechanical/Electrical	BSc in Engineering	CAD, Process	10,000 - 40,000+	SOTEN Industrial

	Engineer		Improvement, Maintenance Supervision, Project Mgt.		Eng., OVID Construction , CCECC
<b>Pharmaceuticals</b>	Pharmacist/ Chemist	BSc/MSc in Pharmacy/ Chemistry	Regulatory Affairs, Quality Assurance (GMP), R&D	12,000 - 35,000	EPHARM, Addis Pharmaceutical Factory
<b>Pharmaceuticals</b>	Technical/ Production Manager	Degree in Engineering/ Pharmacy	GMP Compliance, Process Validation, Technical Troubleshooting	30,000 - 80,000+	Julphar Pharmaceuticals, EPHARM

Note: Salary ranges are estimates synthesized from multiple sources <sup>43</sup> and job postings, reflecting variations in experience, company type, and location. They are intended for comparative analysis.

The data reveals a critical need for skills that go beyond basic technical competence. Job advertisements for supervisory and managerial roles consistently emphasize the importance of "soft skills." Requirements such as "excellent communication skills," "problem-solving," "time management," and "team leadership" are ubiquitous for any position with responsibility.<sup>49</sup> This indicates that while the lack of hands-on technical ability is a major hurdle for entry-level recruitment, the deficit in managerial and interpersonal skills is a significant barrier to improving productivity and operational efficiency at the firm level. Technical proficiency can often be taught on the job, but the ability to lead a team, communicate effectively across departments, and solve complex, non-routine problems requires a different kind of training and experience. The high rates of worker turnover observed in industrial parks, for instance, are often attributed not just to low pay but also to poor human resource management and communication breakdowns between foreign management and local workers.<sup>36</sup> This suggests that the "skills gap" is twofold: a technical skills gap at the base of the pyramid and a leadership and soft skills gap at the middle and top. Consequently, a comprehensive workforce development strategy must address both, integrating soft skills development into TVET and university curricula and prioritizing targeted

management training programs. The inclusion of soft skills training in World Bank-supported projects for industrial park workers is a clear recognition of this critical need.<sup>36</sup>

## **Part III: The Construction Sector Workforce**

Ethiopia's construction sector is a primary engine of the Iron Economy, fueled by an unprecedented wave of public and private investment in infrastructure. This boom has created a massive demand for labor, establishing a distinct workforce ecosystem with a clear occupational hierarchy and a diverse array of employers. Mapping this workforce is essential for aligning skills development with the nation's ambitious infrastructure pipeline and ensuring that domestic labor can fully participate in and benefit from this growth.

### **3.1. Employment in National Infrastructure Projects**

The labor demand in the construction sector is inextricably linked to the government's extensive infrastructure development agenda. For the past decade, Ethiopia has pursued a strategy of massive public investment in transformative projects that form the physical backbone of the economy. This pipeline of projects is the primary source of employment in the sector. Key examples include the 750 km electrified railway connecting Addis Ababa to the Port of Djibouti, the monumental Grand Ethiopian Renaissance Dam (GERD) hydropower project, and successive phases of the Road Sector Development Program (RSDP), which has been expanding and upgrading the nation's road network since the 1990s.<sup>1</sup>

This focus on infrastructure is set to continue. The Ministry of Transport and Logistics' 10-Year Perspective Plan outlines the ongoing expansion of road networks as a national priority.<sup>1</sup> State-owned enterprises like the Ethiopian Engineering Corporation and the Ethiopian Construction Works Corporation are consistently active, with a steady stream of vacancies related to public projects, ranging from building renovations to the management of large-scale assets like irrigation dams.<sup>23</sup>

Furthermore, international development partners are significant contributors to this project pipeline. The World Bank, for instance, funds major initiatives such as the Ethiopia Digital Foundations Project, which includes the construction of data centers and related IT infrastructure, and the Horn of Africa Groundwater for Resilience Project, which involves the construction of 110 rural piped water systems.<sup>34</sup> These donor-funded projects not only deliver essential services but also generate substantial employment for construction workers, engineers, and project managers across the country. The scale of capital expenditure allocated in the national budget for such projects ensures that the construction sector will remain a dominant source of employment for the foreseeable future.<sup>82</sup>

### **3.2. Profile of Employers: A Mix of Public, Private, and International Players**

The construction workforce in Ethiopia is employed by a heterogeneous mix of entities, reflecting the complex nature of the industry's financing and execution. This landscape includes large state-owned enterprises (SOEs), a growing number of international contractors, and a vast and varied domestic private sector.

**Public and State-Owned Enterprises** are major players, particularly in large-scale strategic infrastructure. The Ethiopian Engineering Corporation, the Ethiopia Roads Administration, and the Ethio-Djibouti Railway Share Company are prominent public-sector employers, frequently advertising vacancies for engineering and technical roles.<sup>79</sup> These organizations are responsible for implementing many of the government's flagship projects.

**International Contractors** have a significant and highly visible presence, especially in complex, high-value projects. Chinese firms, in particular, have become dominant actors in the Ethiopian construction market. Companies like the China Civil Engineering Construction Corporation (CCECC) are actively hiring local and international staff for their projects in Ethiopia.<sup>79</sup> A comparative study on employment conditions noted that Chinese firms are major players in road building and other large projects, bringing their own management systems and, at times, their own labor for specialized roles, while hiring Ethiopian workers for the majority of positions.<sup>83</sup>

**Local Private Contractors** form the largest and most diverse group of employers. The sector includes a handful of large, well-established Grade-1 contractors like



ASER Construction PLC and OVID Construction PLC, which are capable of undertaking major building and infrastructure works and are significant employers of skilled professionals.<sup>54</sup> Below them is a broad pyramid of medium and small-scale private firms, such as Genene Kumalo GC & WWC and Mepo Contracting and Management Service Plc, which operate as main contractors on smaller projects or as subcontractors on larger ones.<sup>79</sup> This segment of the market is crucial for providing the bulk of employment opportunities, particularly for skilled tradespeople and general laborers across the country.

### 3.3. Occupational Hierarchy and Skill Requirements

The construction sector workforce is organized in a clear occupational pyramid, reflecting the different phases of a project from design and management to on-site execution. At the peak are highly qualified professionals, in the middle are the crucial supervisory and skilled trade layers, and at the base is a massive pool of semi-skilled and unskilled labor.

**High-Level Professional and Managerial Roles:** This tier is responsible for project planning, design, and overall management. Job advertisements show strong demand for Project Directors, Construction Engineers, Office Engineers, Assistant Resident Engineers, Material Engineers, and Quality Control Engineers.<sup>54</sup> These positions invariably require a Bachelor of Science (BSc) degree in Civil Engineering, Construction Technology Management, or a related field. They also demand significant work experience, typically ranging from a minimum of four years for junior engineering roles to eight years or more for senior management and director-level positions.

**Mid-Level Supervisory and Technical Roles:** This layer forms the critical link between management and the on-site workforce. Key roles include Construction Foreman, General Foreman, and specialized inspectors like Sanitary Site Inspectors.<sup>84</sup> These positions are intensely practical and require deep on-site experience. The educational requirements are often an Advanced Diploma from a TVET college, although extensive, proven experience can sometimes substitute for formal qualifications. These individuals are responsible for the day-to-day supervision of labor, coordination of tasks, and ensuring safety and quality compliance on the

ground.

**Skilled Trades and Equipment Operators:** This group comprises the skilled hands-on workforce. It includes a wide variety of trades such as Senior Mechanics, Plumbers, and Welders, as well as specialized Concrete Pump Operators and Machine Block Operators.<sup>44</sup> These roles are almost exclusively filled by graduates of the TVET system, who hold certificates and diplomas in specific trades. Practical experience is highly valued, and proficiency with specific types of machinery is often a key requirement.

**Low-Skill and Unskilled Labor:** At the base of the pyramid is a vast workforce of general laborers. While these positions are rarely advertised on formal job platforms, they constitute the largest share of employment in the sector. This workforce is typically engaged in manual tasks such as excavation, material handling, and site preparation. A study focusing on the sector noted that formal training for this segment of the workforce is very low, with only around 20 percent of unskilled or semi-skilled workers receiving any form of structured training.<sup>83</sup> This highlights a significant area for potential intervention to improve safety and productivity.

The clear distinction between the roles and qualifications of a university-educated Construction Engineer and an experienced, TVET-educated Construction Foreman points to a fundamental duality in the sector's human capital needs. The engineer's role is primarily focused on design, analysis, planning, and contract management, requiring strong theoretical and analytical skills.<sup>54</sup> The foreman's role is centered on execution, supervision, and practical problem-solving on the construction site, demanding leadership and deep hands-on experience.<sup>85</sup> This signifies the need for two distinct but complementary training pipelines. An effective national workforce strategy must therefore support both high-quality university engineering programs and robust, practical TVET programs. Furthermore, the well-documented skills gap among engineering graduates, who often lack practical applicability<sup>70</sup>, elevates the importance of the experienced foreman role and suggests a need to create career pathways that bridge this divide, perhaps through programs that allow experienced foremen to upgrade their qualifications to an engineering level.

The very establishment and mandate of the Ethiopian Construction Authority (ECA) reveal another critical aspect of the sector's employment landscape. The government's explicit acknowledgement of widespread problems with quality, cost overruns, and project delays led to the creation of the ECA as a powerful regulatory

body.<sup>87</sup> The Authority is tasked with a vast range of responsibilities, including auditing projects, controlling designs, licensing professionals, and developing national construction codes.<sup>22</sup> This indicates that the sector's rapid growth outpaced its governance and quality control frameworks. Consequently, a new and growing area of skilled employment has emerged within the regulatory and quality assurance ecosystem itself. The demand for

Quality Control Engineers and Site Inspectors at the firm level <sup>84</sup> is a direct market response to this quality imperative. Therefore, any comprehensive employment map must include these regulatory and compliance roles as a key component of the high-skill segment of the construction workforce.

To provide a structured overview for policymakers, the following table categorizes the key occupations within the construction sector.

**Table 3.1: Key Occupations in the Ethiopian Construction Sector (Mid-2025)**

Occupational Tier	Job Title	Typical Employer Type	Required Qualifications (Degree/Diploma/TVET)	Required Experience (Years)	Key Responsibilities (from Job Ads)
Management	Project Director	Private Local, Private Intl.	BSc/MSc in Civil Engineering	10+	Overall project leadership, budget control, stakeholder management.
Engineering	Construction Engineer	Public, Private Local, Private Intl.	BSc in Civil Eng./Const. Mgt.	2-8+	Site management, project execution, technical problem-solving, reporting.

<b>Engineering</b>	Office Engineer	Public, Private Local	BSc in Civil Eng./Const. Mgt.	4+	Contract administration, documentation, planning, reporting.
<b>Engineering</b>	Material/Quality Control Engineer	Public, Private Local	BSc in Civil Eng./Geology	2-8	Material testing, quality assurance, standards compliance.
<b>Supervision</b>	Construction Foreman	Private Local, Private Intl.	Advanced Diploma/TVE T Level V	8-10+	Daily on-site supervision, coordinating labor, ensuring safety.
<b>Supervision</b>	Site Inspector	Private Local (Consultants)	Diploma/BSc in relevant field	5+	Inspecting works (e.g., sanitary, electrical) for compliance.
<b>Skilled Trade</b>	Senior Mechanic	Private Local, Public	TVET Diploma/Certificate	6+	Maintenance and repair of heavy machinery and vehicles.
<b>Skilled Trade</b>	Plumber/Welder	Private Local, Public	TVET Diploma/Certificate	1-4+	Installation and repair of piping/metal structures.
<b>Operator</b>	Heavy Machinery Operator	Private Local, Public	Specific License + Experience	3-4+	Operating equipment like concrete pumps, excavators,

					etc.
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Note: Data synthesized from multiple job postings and reports.<sup>22</sup> Experience and qualification requirements can vary significantly by employer and project scale.

## Part IV: The Logistics and Transport Sector Workforce

The logistics and transport sector is the circulatory system of Ethiopia's Iron Economy, physically connecting manufacturing hubs, construction sites, agricultural zones, and international markets. Its efficiency is a primary determinant of the nation's overall economic competitiveness. As the government aggressively pursues modernization and infrastructure investment in this sector, the employment landscape is undergoing a significant transformation, creating new roles and demanding a higher level of professional skill.

### 4.1. Employment across the National Supply Chain

The logistics workforce is distributed across the entire length of the national and international supply chain. Employment opportunities range from strategic management of global trade flows to the operational handling of goods within the country. At the strategic level, companies are hiring Import Export Managers to navigate the complexities of international trade, including customs regulations and documentation, and Supply Chain Managers to design and oversee integrated logistics strategies that optimize cost, time, and risk.<sup>88</sup>

Further down the operational chain, a large number of jobs exist in warehousing and distribution. National Warehouse Managers are sought to provide strategic and operational leadership for large-scale storage facilities for raw materials and finished goods, ensuring seamless coordination with other supply chain functions.<sup>44</sup> These managers are supported by a team of

Warehouse Assistants and Logistics Assistants who handle the day-to-day tasks of receiving, storing, inventory management, and dispatching goods.<sup>89</sup>

The final-mile and domestic transport segment is another major source of employment, with a constant demand for Drivers and Dispatchers to ensure the physical movement of goods across the country.<sup>92</sup> The government's intense focus on improving logistics performance as a means to rectify the national trade deficit and enhance global competitiveness is the primary policy driver for growth and modernization in this sector.<sup>6</sup> This is operationalized through the MoTL's 10-Year Perspective Plan, which guides investments and reforms.<sup>1</sup> A key institutional actor is the Ethiopian Freight Forwarders and Shipping Agents Association (EFFSAA), which plays a vital role in professionalizing the sector through training, advocacy, and the setting of industry standards.<sup>32</sup>

#### 4.2. Key Employment Nodes: Corridors, Ports, and Hubs

Logistics employment in Ethiopia is geographically concentrated at critical nodes that serve as gateways and consolidation points for trade and distribution. These hubs are the nerve centers of the country's supply chain.

The **Ethio-Djibouti corridor** is the single most important artery for Ethiopia's international trade, handling the vast majority of its imports and exports. The 756 km electrified Ethio-Djibouti Railway (EDR) is described as a "crucial artery" and is a significant employer in the transport sector, with vacancies for various operational and technical roles frequently advertised.<sup>6</sup> The efficiency of this corridor directly impacts the competitiveness of the entire economy.

To ease congestion at the border and streamline the customs process, Ethiopia has been developing a network of **inland dry ports**. The dry port in Dire Dawa, for instance, is a strategic facility designed to serve the eastern part of the country and the industrial zones in the region. The recent inauguration of a new access road connecting the port to the main highway and the Dire Dawa Free Trade Zone highlights ongoing investment to enhance its capacity and importance as a localized employment hub for logistics professionals.<sup>94</sup>

**Addis Ababa** remains the undisputed center of the logistics sector. As the nation's capital and primary commercial hub, it is the location for the headquarters of nearly all major logistics companies, importers, exporters, and manufacturers. An analysis of job postings shows that the vast majority of managerial, administrative, and

specialized logistics roles—such as Supply Chain Manager, Logistics Manager, and Warehouse Manager—are based in Addis Ababa.<sup>44</sup> The city's warehouses and distribution centers are the primary nodes for breaking down bulk imports and consolidating goods for domestic distribution and export.

### 4.3. Core Occupations and Emerging Skill Needs in a Modernizing Sector

The occupational structure of the logistics sector is evolving rapidly. While traditional operational roles remain fundamental, the government-led push for modernization and digitalization is creating strong demand for a new and more sophisticated set of skills related to technology, data analysis, and strategic management.

**Traditional operational roles** continue to form the base of the employment pyramid. These include Drivers with the appropriate commercial licenses, Warehouse Assistants for manual handling and inventory tasks, and Logistics Assistants who manage paperwork and coordinate dispatches.<sup>90</sup> These positions typically require TVET diplomas and one to three years of relevant experience.

However, the significant shift is occurring at the **managerial and specialist levels**. The role of a Supply Chain Manager has transformed from a purely operational one to a highly strategic function. Job descriptions for these positions now demand skills in developing integrated strategies, data-driven decision-making for cost reduction and risk mitigation, and managing relationships with third-party logistics providers (3PLs).<sup>88</sup> Similarly, a

Logistics Manager is now expected to have a perfect knowledge of international trade rules, customs procedures, and proficiency with various IT applications and enterprise resource planning (ERP) software.<sup>96</sup>

This evolution is being driven by **digitalization**. The Ministry of Transport and Logistics has explicitly stated its commitment to "Driving Digital Transformation" through partnerships with Ethio-telecom to implement digital systems for traffic penalty management and fuel marketing.<sup>18</sup> Government reports confirm that a key priority is to move the sector from manual, paper-based systems to modern digital platforms to enhance efficiency and transparency.<sup>97</sup> This technological shift will inevitably reshape job profiles across the sector. It will demand higher levels of IT



literacy from all employees and create new roles focused on managing logistics information systems, analyzing supply chain data, and developing digital solutions.

The educational requirements reflect this bifurcation. Operational roles can be accessed with diplomas in Logistics and Supply Chain Management from TVET colleges.<sup>90</sup> However, the emerging strategic and managerial roles increasingly require Bachelor's or even Master's degrees in Supply Chain Management, Business Administration, or International Trade to equip professionals with the necessary analytical and strategic capabilities.<sup>88</sup>

This trend marks the emergence of the "professional logistician" in Ethiopia. The sector is clearly transitioning from being perceived merely as "transport" to a sophisticated, professionalized field of "supply chain management." The sophisticated language used in senior-level job advertisements—referencing concepts like "integrated supply chain strategies," "RFP/RFQ processes," "3PL management," and "KPIs"—is a testament to this shift.<sup>88</sup> Furthermore, the active role of the EFFSAA in providing internationally recognized training, such as the FIATA Diploma, signifies a concerted effort to build a cadre of professionals who adhere to global standards.<sup>32</sup> This evolution creates a demand for university-educated individuals with strong analytical, digital, and strategic skills, a development that workforce planners and educational institutions must recognize and respond to.

At the same time, this rapid digitalization presents a significant challenge. While it promises to unlock immense efficiency gains, it also functions as a double-edged sword for the workforce. The automation of processes like customs clearance, freight management, and documentation could displace workers in traditional clerical and manual processing roles. Simultaneously, it will create a premium for a new class of tech-savvy workers who can manage these digital platforms and interpret the data they generate. This creates a clear risk of a skills-based bifurcation within the logistics workforce, where those with low digital literacy are left behind. A proactive national strategy is therefore essential to upskill and reskill the existing workforce, ensuring that the benefits of modernization are shared broadly and that the transition to a digital logistics sector is inclusive.

## **Part V: Cross-Cutting Labor Market Dynamics**

Beyond the specific characteristics of each sector, several powerful, cross-cutting dynamics shape the entire employment landscape of Ethiopia's Iron Economy. These include the pervasive influence of the informal economy, the unique structure of wages and compensation, and the diverse spectrum of employment arrangements. Understanding these overarching themes is crucial for developing holistic and realistic national workforce and industrial policies.

### **5.1. The Pervasive Informal Economy: Foundation and Challenge**

The informal economy is the single most dominant feature of Ethiopia's labor market. It is not a marginal or separate sector but a vast and deeply integrated component of the national economy that functions as the primary source of employment, a supplier to the formal sector, a competitor to formal firms, and the de facto social safety net for the majority of the population. According to some estimates, the informal sector contributes as much as 38.6 percent of Ethiopia's GDP and provides employment for over 90 percent of the country's workforce.<sup>99</sup> It is overwhelmingly composed of micro and small enterprises (MSEs).<sup>17</sup>

The characteristics of these informal enterprises are distinct. A nationwide urban survey found that 56 percent are owned by women, and a majority are run by young people under the age of 35. They typically operate with minimal startup capital—over 86 percent were established with less than 10,000 ETB—and have virtually no access to formal finance from banks or microfinance institutions. Furthermore, operators often lack formal business or vocational training.<sup>99</sup>

Despite these constraints, the informal economy is deeply enmeshed with the formal Iron Economy. Informal MSEs are active in manufacturing activities directly relevant to the industrial sector, such as traditional weaving, shoemaking, metalwork, and furniture making.<sup>100</sup> Crucially, they often operate as subcontractors and suppliers to larger, formal enterprises. For example, informal shoemakers may produce footwear for well-known formal brands, and traditional weavers supply fabrics to formal fashion designers.<sup>100</sup> This demonstrates a direct, albeit unregulated, supply chain linkage that is vital for the functioning of certain industries.

However, this proximity also creates challenges. Informal firms, which often avoid taxes and regulations, can compete with formal businesses on price, potentially

reducing the market share, productivity, and capacity utilization of registered firms. This dynamic can create a disincentive for formal firms to grow and for informal firms to formalize.<sup>101</sup> This presents a profound policy dilemma for the government. On one hand, there is a strong desire to formalize the economy to expand the tax base, improve regulatory oversight, and enhance worker protections. On the other hand, given that the informal sector is the primary source of livelihood for millions, a heavy-handed enforcement approach could have devastating social and economic consequences.<sup>99</sup>

## **5.2. Compensation Structures and Wage Analysis**

Wages and compensation within Ethiopia's Iron Economy are defined by several key features: an overall low-wage environment, a significant disparity between different skill levels and employer types, and a precarious reliance on non-wage benefits for low-skilled workers. This structure is, in part, a result of a deliberate government strategy to use low labor costs as a primary incentive to attract foreign direct investment, particularly in labor-intensive manufacturing.<sup>43</sup>

The overall average monthly salary in Ethiopia is estimated to be around 7,052 ETB (approximately USD 55), with a median income of 6,529 ETB (USD 51).<sup>43</sup> As of 2024, there is no legally mandated minimum wage for the private sector. However, a de facto minimum has been established in the industrial parks, where the basic starting salary for a garment worker is around 750 ETB per month (approximately USD 5.85).<sup>43</sup> This exceptionally low base wage makes workers highly dependent on supplementary allowances for food, transport, and attendance bonuses to meet their basic living costs. The fragility of this system was exposed during the COVID-19 pandemic, when the removal of these allowances by struggling firms led to mass resignations, with over 11,000 employees leaving their jobs in a single quarter.<sup>45</sup>

There is significant variation in compensation across different sectors and roles. In manufacturing, general production jobs may range from 3,228 ETB to 11,182 ETB per month, while experienced manufacturing managers can earn between 10,216 ETB and 32,049 ETB.<sup>67</sup> In construction, skilled professionals like mechanical engineers see a wide salary range based on experience, starting around 11,583 ETB and rising to over 32,000 ETB after five years of service.<sup>77</sup>

A major driver of wage disparity is the type of employer. There is a substantial premium for working for non-governmental organizations (NGOs) and international companies. For comparable roles, salaries in these organizations can be 80 to 125 percent higher than those offered by local private companies.<sup>75</sup> An entry-level position in an international organization might offer a starting salary of around 18,000 ETB, more than double the average in a local firm. This creates a powerful economic incentive for skilled professionals to seek employment with international entities, potentially exacerbating the talent shortage in the domestic private sector. The low-wage model, while successful in attracting initial investment, appears to be inherently unstable. It fosters a high-turnover, low-retention labor market that hinders the development of a stable and skilled industrial workforce. This high churn rate directly harms firm productivity and works against the long-term goal of industrial upgrading.<sup>36</sup> This suggests that while the strategy may be effective for initial, large-scale job creation, it is socially and economically unsustainable for achieving long-term productivity growth and meaningful poverty reduction.

### **5.3. Employment Arrangements and Workforce Demographics**

The workforce of the Iron Economy is engaged through a diverse spectrum of employment arrangements, reflecting the varied nature of the sectors and the coexistence of formal and informal systems. The demographic profile of this workforce is characterized by its youthfulness and the prominent role of women in specific industries.

Formal employment arrangements are prevalent in the modern, registered sector. Job advertisements clearly specify various contract types, including Full time permanent positions, fixed-term Contract roles (common in construction projects), and Internships designed for recent graduates to gain initial experience.<sup>63</sup> These formal arrangements typically provide a degree of job security and access to benefits, although as noted, the base pay can be very low.

Informal employment, as established previously, remains the dominant arrangement for the majority of Ethiopia's working population.<sup>99</sup> This includes self-employment in micro-enterprises, daily wage labor in construction, and piece-rate work subcontracted from the formal sector. These arrangements are characterized by a

lack of formal contracts, job security, and social protection.

A new and rapidly emerging segment of the labor market is the freelance or "gig" economy. The proliferation of online talent marketplaces like Upwork and Afriwork is enabling skilled Ethiopians to bypass the local labor market and offer their services directly to global clients.<sup>104</sup> This is particularly prevalent for technical, creative, and professional services relevant to the Iron Economy, with freelancers offering skills in

Technical Writing, Architecture, Engineering, and Graphic Design.<sup>105</sup> This trend is being actively encouraged through initiatives like the Digital Freelancing Training Programme, supported by the International Trade Centre (ITC), which aims to equip young people with the skills to build sustainable careers in the global gig economy.<sup>108</sup> This development presents both a significant opportunity for skilled individuals to earn higher incomes and a potential challenge for the domestic formal sector, which may struggle to compete for top talent.

Demographically, Ethiopia's workforce is one of the largest in Africa, with 56 million people, and is characterized by its extreme youthfulness.<sup>7</sup> This presents both a "demographic dividend" in the form of abundant labor and a massive challenge in terms of job creation, as high youth unemployment remains a major national issue.<sup>71</sup> Within this workforce, women play a particularly crucial role, forming the backbone of labor-intensive export industries like garments and textiles, where they constitute over 80 percent of the employees in many industrial parks.<sup>36</sup> Any national workforce strategy must therefore be gender-sensitive, addressing the specific needs and challenges of this large female industrial workforce.

To provide a clear comparative view of the compensation landscape, which is a critical factor for workforce planning, retention strategies, and understanding economic incentives, the following table benchmarks salary data across the Iron Economy.

**Table 5.1: Comparative Salary Benchmarks Across the Iron Economy (ETB/Month, Mid-2025)**

Sector	Job Title	Experience Level	Employer Type	Average Reported Salary Range (ETB)	Key Data Points/Notes

<b>Manufacturing</b>	Garment Operator	0-2 yrs	Foreign/IP	750 - 4,500	Base pay is extremely low; highly reliant on allowances. High turnover.
<b>Manufacturing</b>	Production Supervisor	3-5 yrs	Local Private	7,000 - 15,000	Requires TVET diploma and practical experience.
<b>Manufacturing</b>	Senior Engineer	5+ yrs	Local Private	20,000 - 40,000	BSc in Engineering required.
<b>Manufacturing</b>	Plant Manager	5+ yrs	Foreign/IP	30,000 - 70,000+	MSc or extensive experience in modern management needed.
<b>Construction</b>	General Laborer	0-2 yrs	Private Local	3,500 - 6,000	Mostly informal or daily wage, highly precarious.
<b>Construction</b>	Foreman	5+ yrs	Private Local	15,000 - 35,000	High value placed on extensive on-site experience.
<b>Construction</b>	Civil Engineer	3-5 yrs	Public/SOE	12,000 - 25,000	Stable employment but generally lower pay than top private firms.
<b>Construction</b>	Project	10+ yrs	Private Intl.	80,000 -	Highly

<b>n</b>	Director			150,000+	competitive roles often filled by expatriates or diaspora.
<b>Logistics</b>	Warehouse Assistant	0-2 yrs	Local Private	5,000 - 9,000	Requires diploma in supply chain or related field.
<b>Logistics</b>	Driver	3-5 yrs	Local Private	8,000 - 15,000	Requires specific commercial driving licenses.
<b>Logistics</b>	Supply Chain Manager	5+ yrs	Local Private	25,000 - 60,000	Requires degree and strategic skills.
<b>Logistics</b>	Import/Export Manager	5+ yrs	NGO/Intl.	50,000 - 100,000+	Significant premium for working in international organizations.

Note: Salary ranges are synthesized estimates based on available data from sources including.<sup>43</sup> They are intended for comparative analysis and are subject to significant variation based on specific company policies, location, and individual negotiation.

## Part VI: Strategic Synthesis and Policy Pathways

### 6.1. Integrated Analysis: The Iron Economy's Critical Fault Lines



A comprehensive analysis of Ethiopia's Iron Economy reveals an industrial ecosystem at a critical juncture. Despite impressive growth and ambitious national plans, the system is strained by three interconnected "fault lines" that threaten the sustainability and inclusivity of the country's industrialization agenda. Addressing these structural weaknesses through coordinated policy is paramount for realizing the vision of a prosperous, manufacturing-led economy.

First is the **Human Capital Chasm**. This is the profound and persistent gap between the skills supplied by the national education and training system and the complex, evolving needs of a modern industrial economy. This is arguably the most significant binding constraint on Ethiopia's development. The chasm exists at all levels: TVET graduates often lack the practical, hands-on skills demanded by employers in construction and manufacturing, while university-educated engineers are frequently criticized for having strong theoretical knowledge but little capacity for practical application. Compounding this technical skills gap is a severe deficit in managerial and soft skills. The economy is producing workers and graduates but is struggling to produce the supervisors, managers, and leaders who can drive productivity, manage diverse teams, and solve complex operational problems. This fault line directly limits technology absorption, operational efficiency, and the ability of Ethiopian firms to move up the value chain.

Second is the **Linkage Deficit**. This refers to the weak integration between the modern, FDI-driven, export-oriented industrial sector—largely sequestered within industrial parks—and the broader domestic economy. The IP model has been successful in attracting investment and creating jobs, but it operates largely as an enclave. Firms within the parks import the majority of their raw materials and intermediate inputs, creating very limited demand for local products and services. This lack of backward linkages means that the vast potential for the IPs to stimulate growth in domestic SMEs, transfer technology, and deepen local value chains remains largely unrealized. This creates a dual economic structure where the "modern" sector has minimal spillover effects, preventing the development of a resilient and integrated national industrial ecosystem.

Third is the **Sustainability Paradox**. This is the inherent contradiction in a development model that relies on attracting investment through extremely low wages. While this strategy has succeeded in creating a large number of entry-level

jobs, particularly for women in the garment sector, it has created a fragile and unstable labor market. The low wages are insufficient for a decent standard of living, leading to a precarious workforce that is highly dependent on non-wage allowances. This results in exceptionally high rates of worker turnover, which is costly for firms, undermines productivity, and prevents the accumulation of skills and experience within the workforce. This model, while effective for attracting initial investment in low-skill assembly, is socially and economically unsustainable for the long-term goal of building a competitive, high-productivity manufacturing sector. It traps the economy in a low-skill, low-wage equilibrium that is difficult to escape.

## 6.2. Forecasting Future Workforce Needs: Skills for Tomorrow's Industry

Looking toward the next decade, the evolution of Ethiopia's Iron Economy, driven by technological change, policy priorities, and global market trends, will demand a significant shift in the composition and capabilities of its workforce. Proactive workforce planning must anticipate these changes to ensure the education and training system is producing graduates with the skills required for the industries of tomorrow, not the industries of yesterday.

A primary trend will be the **shift from operators to technicians**. As industries, particularly manufacturing, begin to adopt more automated processes to improve efficiency and quality, the demand for basic, single-task machine operators will decline. In its place will be a rising demand for multi-skilled technicians who can operate, maintain, and troubleshoot more complex, integrated systems. This points to a future need for professionals with skills in mechatronics, industrial automation, and CNC (Computer Numerical Control) programming—roles that require a higher level of technical education and analytical problem-solving ability than traditional operator jobs.

The growing global and national focus on sustainability will give rise to a **"green" workforce**. Ethiopia's commitment to building a climate-resilient green economy, coupled with investments from partners in sustainable infrastructure, will create new categories of employment.<sup>34</sup> This will include jobs in the construction and maintenance of renewable energy projects (solar, wind, geothermal), specialized roles in waste management and water treatment within industrial parks to meet

international environmental standards, and skilled positions in developing sustainable agricultural supply chains to feed the Integrated Agro-Industrial Parks.

In the logistics sector, the most significant change will be the **rise of the digital logistician**. The government's explicit policy of digitalizing the transport and logistics sector will render many manual, paper-based processes obsolete.<sup>18</sup> This will create a surge in demand for professionals who are proficient in logistics information systems, supply chain data analytics, and the management of e-commerce fulfillment platforms. The logistician of the future will be a data analyst and a technology manager, not just a coordinator of physical shipments.

Finally, and perhaps most critically, the success of Ethiopia's industrial upgrading will depend on cultivating a new class of **industrial managers**. To move beyond simple assembly, firms will require leaders with deep expertise in industrial engineering, quality management methodologies (such as Lean and Six Sigma), integrated supply chain optimization (S&OP), and modern human resource management practices that can reduce turnover and build a motivated, productive workforce. The scarcity of these managerial skills is currently a major bottleneck, and filling this gap will be essential for driving firm-level and sector-wide productivity gains.

### **6.3. Actionable Recommendations for Coordinated National Policy**

Addressing the critical fault lines of the Iron Economy and preparing for future workforce needs requires a concerted and coordinated policy response. The following recommendations are targeted at the key institutional actors within Ethiopia's policy ecosystem.

#### **1. For the Ministry of Labor and Skills (MoLS) and Ministry of Education:**

36. **Transform University Engineering and Business Curricula:** Initiate a mandatory, industry-led review of all engineering, business, and supply chain management curricula at public universities. This reform should focus on integrating practical, hands-on learning, modern management theories (e.g., lean manufacturing, quality control systems), and a mandatory, graded internship program with private sector firms. This directly addresses the documented skills gap among university graduates.<sup>70</sup>

37. **Establish Elite TVET "Master Technician" Programs:** Create a new, prestigious track within the TVET system focused on developing high-level skills for the future industrial economy. These multi-year programs in fields like industrial automation, mechatronics, CNC programming, and green technology should be developed in deep partnership with industry, offer high-quality training on modern equipment, and lead to well-compensated roles, providing a viable and respected alternative to a traditional university degree.
38. **Implement a National Soft Skills Certification:** Develop and integrate a standardized, certified module on essential soft skills—including communication, teamwork, critical thinking, and problem-solving—into all secondary, TVET, and university education programs to address the soft skills deficit identified by employers.

## **2. For the Ministry of Industry (MoI) and Ethiopian Investment Commission (EIC):**

39. **Incentivize Domestic Backward Linkages:** Revise the investment code to create powerful, tangible incentives for firms operating within IPs to source their inputs from domestic suppliers. This could include preferential access to foreign exchange, enhanced tax breaks, or streamlined logistics for firms that meet verifiable targets for local procurement. This policy would directly attack the "linkage deficit" and create a market for local SMEs.<sup>2</sup>
40. **Launch a "Linkage Development and Technology Transfer Fund":** Earmark a portion of the revenue generated from industrial park land leases to establish a dedicated fund. This fund would provide targeted grants and intensive technical assistance to promising local SMEs, helping them upgrade their technology, quality control, and production scale to meet the rigorous standards required to become suppliers to IP firms. This would operationalize and scale up successful B2B linkage pilot programs.<sup>36</sup>
41. **Modernize Investment Incentives:** Shift the criteria for investment incentives beyond simple job creation numbers. Future incentives should be tied to a basket of performance metrics, including average wage growth, worker retention rates, and demonstrable investment in employee skills development. This would begin to address the instability of the low-wage model and encourage investors to build a more sustainable human capital base.<sup>45</sup>

## **3. For the Ministry of Transport and Logistics (MoTL):**

42. **Develop a National Digital Logistics Skills Roadmap:** In close collaboration

with MoLS and the EFFSAA, create a comprehensive national strategy for developing the human capital required for a fully digital logistics sector. This roadmap should include programs to upskill the existing workforce in digital literacy and establish new training curricula in logistics information systems, supply chain analytics, and e-commerce platform management.

#### **4. For a National-Level Coordinating Body (e.g., Prime Minister's Office):**

- 43. Establish a Permanent "Iron Economy Workforce Council":** To overcome institutional fragmentation, create a high-level, permanent council with executive authority. This body should include the relevant Ministers (Industry, Labor & Skills, Transport), the head of the EIC, and leaders from the ECCSA and key sectoral associations. Its core mandate would be to oversee a dynamic National Workforce Plan for the Iron Economy, using real-time labor market data from platforms like HahuJobs <sup>110</sup> to ensure that industrial, infrastructure, education, and skills policies are tightly aligned and mutually reinforcing.
- 44. Adopt a Pragmatic and Supportive Informal Sector Strategy:** Shift the policy focus from enforcement to "enabled formalization." This involves creating clear pathways for informal enterprises to transition to the formal economy by providing them with tangible benefits. Key interventions should include simplified registration processes, access to targeted skills training and micro-finance, and, most importantly, facilitated access to markets, particularly as suppliers to the formal firms in the Iron Economy. This approach makes the benefits of formalization outweigh the costs, fostering a more inclusive and dynamic economic base.

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# **Ethiopia's Lavender Economy: A Nationwide Analysis of Employment Opportunities in the Care and Helping Sectors**

## **Executive Summary**

This report presents a systematic nationwide examination of employment opportunities within Ethiopia's Lavender Economy, the comprehensive care sector underpinning national health, social wellbeing, and community development. The analysis reveals a sector at a critical inflection point, characterized by ambitious national policies, a growing supply of trained professionals, and significant dynamism in the private and non-governmental spheres. However, this potential is profoundly constrained by systemic challenges, most notably a severe public sector compensation crisis, deep geographic and regional disparities in workforce distribution, and a persistent gap between policy intent and implementation reality.

The Ethiopian health and social care landscape is a complex tapestry woven from four distinct employment ecosystems: a foundational but strained public sector anchored by the Health Extension Program (HEP); a concentrated and rapidly growing private for-profit sector, primarily in urban centers; a vital but project-dependent Non-Governmental Organization (NGO) and development partner sector; and a vast, deeply-rooted informal and community-based care system that is increasingly being integrated into formal health strategies.

Key findings indicate critical workforce shortages in specific cadres, including allied health professionals like pharmacists and laboratory technologists, as well as emerging fields such as geriatric care, palliative care, and mid-level mental health providers. Simultaneously, a paradox of graduate unemployment exists for other cadres, driven by the public sector's limited absorptive capacity and non-competitive remuneration. The nascent digital health sub-sector presents a significant high-growth niche, yet its current trajectory threatens to exacerbate the urban-rural divide without strategic interventions to ensure equitable access and infrastructure



development.

This report provides a granular occupational analysis across fourteen sub-sectors, detailing job roles, competency requirements, compensation ranges, and career pathways. It maps the stark geographic disparities in workforce density, identifying "health deserts" in pastoralist and conflict-affected regions and "opportunity hotspots" in urban centers.

The analysis culminates in a series of strategic recommendations for key stakeholders. For the Government of Ethiopia, urgent action is required to reform public sector salaries, strategically manage the public-private mix, and modernize the Health Extension Program. For educational and training institutions, there is a clear mandate to align curricula with identified market needs, scaling up training in gap areas and developing new programs in fields like health informatics and geriatric care. For investors and development partners, recommendations focus on supporting sustainable employment models, investing in "last-mile" digital health solutions, and funding workforce development in critical shortage areas.

By addressing these systemic challenges and capitalizing on emerging opportunities, Ethiopia can unlock the immense potential of its Lavender Economy to not only meet the critical health and social needs of its population but also to serve as a powerful engine for inclusive economic growth, human capital development, and national resilience.

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## **Part I: The Strategic Context of Ethiopia's Lavender Economy**

The employment landscape of Ethiopia's care sector is not an arbitrary market; it is actively shaped and directed by a comprehensive architecture of national policies and strategic plans. These frameworks articulate the government's priorities, define the scope of essential services, and consequently generate the demand for the diverse workforce that constitutes the Lavender Economy. Understanding this policy context is fundamental to analyzing the sector's current structure and future trajectory. This section examines the core policy pillars—the National Health Policy and Health Sector Transformation Plan, the National Social Protection Policy, and the National Mental Health Strategy—to establish the strategic environment in which care

work is defined, valued, and deployed.

## **1.1 The National Health Policy and Health Sector Transformation Plan (HSTP)**

Ethiopia's commitment to improving the health of its citizens is formally enshrined in its National Health Policy, a foundational document that emphasizes decentralization, health promotion, disease prevention, and the provision of basic curative services as its guiding principles.<sup>1</sup> This high-level policy is operationalized through a series of multi-year Health Sector Transformation Plans (HSTP), which translate broad goals into concrete targets and programs. The overarching ambition driving these plans is the attainment of Universal Health Coverage (UHC) by 2035, ensuring all citizens have access to essential health services without facing financial hardship.<sup>2</sup>

The current strategic period is guided by the Health Sector Transformation Plan II (HSTP-II) and the subsequent Health Sector Development and Investment Plan (2022/23–2025/26). These plans demonstrate a strong alignment with global health agendas, including the Sustainable Development Goals (SDGs), and set ambitious national targets across key domains.<sup>4</sup> For instance, the government has committed to reducing the maternal mortality ratio from 412 to at least 140 per 100,000 live births by 2030, boosting immunization funding by 10% to halve the number of zero-dose children, and reducing the teenage pregnancy rate from 13% to 7% by 2030.<sup>4</sup>

These specific, measurable targets are the primary drivers of demand for specific cadres within the Lavender Economy. The goal of reducing maternal mortality directly necessitates the recruitment, training, and deployment of skilled midwives and maternal health specialists. The focus on adolescent well-being creates demand for youth-friendly service providers and counselors. Similarly, commitments to improving child health through the integrated management of childhood illness (IMNCI) require a robust workforce of pediatric nurses and community-based child health workers.<sup>4</sup>

However, a significant structural challenge looms over these modern strategic initiatives. While the HSTP and its associated investment plans are forward-looking, the foundational legal frameworks they are built upon are considerably dated. Ethiopia's core National Health Policy and National Medicine Policy have remained largely unchanged for over three decades.<sup>5</sup> Although a revision process has been undertaken and is reportedly awaiting ratification by the Council of Ministers, this

temporal disconnect creates a precarious situation where 21st-century health ambitions are being implemented on a 20th-century policy chassis.<sup>5</sup> This lag means the sector's guiding legal principles may not be adequately equipped to address emerging health issues, such as the rise of non-communicable diseases (NCDs), or to regulate new technological and scientific advancements like artificial intelligence in health, gene therapy, and complex ethical questions surrounding in-vitro fertilization (IVF).<sup>5</sup> This gap between the new strategic plans and the old foundational policies creates a climate of potential regulatory uncertainty, which can act as a brake on innovation and investment, thereby affecting the long-term growth and structure of the care sector workforce. The ratification of the revised policies is therefore a critical step to provide a stable and modern legal foundation for the entire Lavender Economy.

## **1.2 The National Social Protection Policy (NSPP)**

The National Social Protection Policy (NSPP), a cornerstone of Ethiopia's broader development strategy, extends the demand for care workers beyond the traditional confines of the health sector and into the wider social domain.<sup>6</sup> The policy is designed as a cross-sectoral framework to reduce poverty, mitigate vulnerability, and enhance the resilience of the population against a range of shocks.<sup>7</sup> Of its five core focus areas, two are of direct and profound relevance to the Lavender Economy: "increasing equitable access to basic social services" and "providing legal protection and support to those vulnerable to abuse and violence".<sup>7</sup>

The NSPP explicitly identifies and targets key vulnerable populations, thereby creating a clear, policy-driven demand for specific types of social care professionals. The policy gives due emphasis to "children under difficult circumstances," "vulnerable pregnant and lactating women," "vulnerable people with disabilities and people with mental health problems," and the "elderly with no care and support".<sup>7</sup> This translates directly into a need for a diverse workforce including social workers, child protection officers, disability support workers, mental health counselors, case managers, and geriatric care providers. The policy's focus on addressing violence and abuse further necessitates the employment of specialists in gender-based violence (GBV) support and community outreach coordinators.<sup>7</sup>

Crucially, the NSPP frames the provision of care not merely as a welfare function but as a strategic instrument for national development. The policy's stated objectives are to "increase access to equitable and quality health, education and social welfare services to build human capital" and to "break [the] intergenerational cycle of poverty".<sup>7</sup> This perspective elevates the role of the Lavender Economy workforce. They are not simply service providers; they are the frontline agents of the state's human capital formation strategy. The nurse who provides antenatal care, the social worker who supports a vulnerable family, and the community health worker who promotes nutrition are all directly contributing to the policy's goal of enhancing national productivity and resilience.

This reframing of care work as a developmental multiplier has significant implications for how the sector should be viewed and funded. It suggests that investments in the Lavender Economy—whether in training, salaries, or infrastructure—are not simply a recurrent expenditure for the health and social affairs ministries. Rather, they are a strategic investment in the country's long-term economic and social prosperity. This perspective is vital for making a compelling case for increased domestic and international financing for the care sector, shifting the narrative from one of cost to one of high-return investment in Ethiopia's future.

### **1.3 The National Mental Health Strategy**

Ethiopia has demonstrated a strong and sustained political commitment to addressing mental health, recognizing that the nation's ambitious economic and social development goals cannot be achieved without a physically and mentally healthy populace.<sup>9</sup> This commitment is operationalized through the National Mental Health Strategy, first developed in 2012 and subsequently updated with a five-year strategic plan for 2020-2025.<sup>10</sup> The strategy's overarching goal is to provide accessible, affordable, and culturally acceptable mental healthcare for all Ethiopians by integrating mental health services into the existing primary healthcare system.<sup>9</sup>

The cornerstone of the strategy's implementation is the adoption of the World Health Organization's Mental Health Gap Action Programme (mhGAP).<sup>11</sup> This model focuses on "task-sharing," which involves training non-specialized health workers—such as nurses, health officers, and Health Extension Workers at the primary care level—to

diagnose, manage, and treat common mental, neurological, and substance use (MNS) disorders.<sup>9</sup> This approach creates a tiered and integrated mental health workforce. At the base are the trained generalist providers in health centers and health posts, who handle the majority of cases. They are supported and supervised by a smaller cadre of specialized professionals, including psychiatric nurses, psychologists, and psychiatrists, who are based at general and specialized hospitals and handle more complex or treatment-refractory cases.<sup>12</sup>

While this policy framework is robust and evidence-based, the workforce required to deliver on its promise is still nascent and faces significant operational fragility. The entire strategy rests on the capacity and motivation of primary health care (PHC) providers who are already overburdened with a multitude of other health programs.<sup>12</sup> Lessons learned from the initial rollout of the strategy highlight a critical risk: without adequate support, the integration of mental health services can be perceived by these frontline workers not as "task-sharing" but as "task-dumping".<sup>12</sup>

The long-term success and sustainability of the national mental health scale-up are therefore contingent on the strength of its support systems. These include ensuring a continuous and reliable supply of psychotropic medications to PHC facilities, establishing a consistent and high-quality structure for supervision and mentorship of the newly trained providers, and developing incentive schemes to motivate and retain this crucial workforce.<sup>12</sup> Given the broader systemic challenges within the Ethiopian health sector, particularly around low compensation and high attrition rates, these essential support functions are highly vulnerable to being under-resourced. This creates a high probability that the mental health strategy could falter not because of a flawed policy, but because of a failure in its operational execution. Consequently, this dynamic generates a specific and critical demand for niche roles within the Lavender Economy, such as dedicated MHPSS supervisors, clinical mentors, and mhGAP trainers, who are essential for bridging the gap between policy ambition and frontline reality.

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## **Part II: The Architecture of Care Provision and Employment**

The delivery of health and social care in Ethiopia is channeled through a complex and multifaceted architecture of institutions, each constituting a distinct employment

ecosystem with its own set of roles, opportunities, and challenges. This landscape can be broadly categorized into four main domains: the vast public sector, which forms the foundation of the national system; a dynamic and growing private for-profit sector; a vital non-governmental and development partner sector that often operates at the frontiers of service delivery; and a deeply entrenched community and traditional system that functions as an informal safety net. A comprehensive understanding of these distinct yet interconnected domains is essential for mapping the full spectrum of employment within the Lavender Economy.

## 2.1 The Public Sector: A Three-Tiered System

The public health system, administered by the Federal Ministry of Health (MoH) and its devolved Regional Health Bureaus (RHBs), is the largest single employer within Ethiopia's Lavender Economy.<sup>13</sup> The system is organized into a three-tiered structure designed to provide a continuum of care from the community to the national level.<sup>5</sup>

At the base of this pyramid is the **Primary Health Care Unit (PHCU)**. This unit is the cornerstone of the system and consists of a health center and five satellite health posts.<sup>15</sup> The

**Health Post**, situated at the *kebele* (the lowest administrative unit), is the most peripheral health facility, designed to serve up to 5,000 people. It is staffed exclusively by **Health Extension Workers (HEWs)**, a cadre of female community health workers who form the vanguard of public health delivery.<sup>15</sup> The

**Health Center** serves as the hub of the PHCU, providing first-level referral care for up to 25,000 people. It employs a broader range of mid-level professionals, including nurses, midwives, health officers, and laboratory technicians, and is responsible for the crucial task of supervising and supporting the HEWs in its catchment area.<sup>15</sup>

The second and third tiers consist of hospitals with increasing levels of specialization. **District (or Woreda) Hospitals** provide secondary referral care for up to 250,000 people, while **Zonal and Tertiary Hospitals** (including specialized and teaching hospitals) offer advanced care, surgical services, and specialist consultations for populations of up to one million or more.<sup>15</sup> These facilities employ the full spectrum of clinical professionals, including general practitioners, specialist physicians (surgeons,

internists, pediatricians, etc.), and a wide array of allied health professionals.

Central to the functioning of this entire public system is the **Health Extension Program (HEP)**. Launched in 2003, the HEP and its army of over 40,000 HEWs operating from more than 17,000 health posts are the bedrock of Ethiopia's primary care strategy.<sup>16</sup> The program has been instrumental in extending access to a package of 18 essential preventive and basic curative health services to the country's predominantly rural population, contributing significantly to the achievement of health-related Millennium Development Goals.<sup>2</sup>

However, this foundational program is now facing significant strain and is widely recognized as being at a critical juncture. After two decades of implementation, the HEP model is struggling to adapt to Ethiopia's changing epidemiological landscape. Recent assessments have revealed that while the program remains highly relevant, it requires a "major transformation" to sustain its gains.<sup>16</sup> Key challenges include high rates of burnout and depression among HEWs, inadequate training infrastructure, and a service package that has not kept pace with the growing burden of malnutrition and non-communicable diseases (NCDs).<sup>16</sup> In response, the Ministry of Health has developed a 15-year roadmap to optimize and evolve the program.<sup>16</sup> This ongoing transformation signals a shift in the employment landscape at the community level. The traditional "generalist" HEW role may no longer be sufficient. This creates an emerging demand for new, specialized, community-based cadres—such as dedicated community nutritionists or NCD screening specialists—to work alongside and support HEWs, as well as a greater need for supervisors and trainers to upskill the existing workforce. The HEP is thus a site of both immense employment and significant, evolving workforce challenges.

## **2.2 The Private For-Profit Sector: A Concentrated Growth Engine**

The private for-profit health sector in Ethiopia is a dynamic and officially encouraged component of the national health system, viewed by the government as a key partner in mobilizing resources and expanding consumer choice to reduce the burden on public facilities.<sup>22</sup> This sector is diverse, encompassing a wide spectrum of providers from small, single-practitioner clinics and retail pharmacies to large, multi-specialty general and specialized hospitals.<sup>24</sup>



In terms of scale, the private sector constitutes a significant portion of the country's health infrastructure, owning approximately 27% of all health facilities. Its presence is particularly strong at the primary care level, with a high concentration of private primary clinics, medium clinics, pharmacies, and drug stores.<sup>24</sup> The hospital segment, while smaller, is growing. As of recent data, there were 31 private hospitals in the country, with a striking geographic concentration: 25 of them are located in the capital, Addis Ababa.<sup>23</sup> This makes the city the undisputed hub of private sector health employment, with major institutions like Teklehaimanot General Hospital, American Medical Center, and Landmark General Hospital serving as key employers of skilled health professionals.<sup>25</sup>

The relationship between the private and public sectors is complex, characterized by both symbiosis and tension. On one hand, there is a clear policy push for partnership. The government has developed national guidelines for Public-Private Mix (PPM) models, particularly for services like MNCH and malaria, facilitating collaboration where private clinics receive public commodities and participate in referral networks.<sup>22</sup> On the other hand, the two sectors are in direct competition for the most valuable resource: skilled human capital. The public sector's severe compensation crisis creates a powerful "push" factor, while the private sector's ability to offer more competitive salaries acts as a strong "pull" factor.

This dynamic effectively creates a one-way flow of experienced professionals from public to private facilities. The public sector bears the substantial cost of training doctors, nurses, and specialists, only to see many of them depart for the private sector after gaining experience. This pattern, combined with the heavy concentration of private facilities in Addis Ababa and a few other major cities, exacerbates the profound geographic inequities in workforce distribution, draining talent from rural and underserved areas where it is most needed.<sup>23</sup> The growth of the private sector, therefore, presents a dual-edged sword. While it is a vital engine for formal employment and service expansion in the Lavender Economy, its current growth model poses a systemic challenge to the equity and stability of the public health system. This underscores the need for policy to evolve from simple promotion to strategic regulation, ensuring that private sector growth complements, rather than undermines, the national goal of universal health coverage.

### **2.3 The NGO and Development Partner Ecosystem**

The non-governmental organization (NGO) and development partner ecosystem represents a third major pillar of employment and service delivery within Ethiopia's Lavender Economy. This sector comprises a wide range of actors, including United Nations agencies, international and local NGOs, and bilateral development partners, who play a critical role in addressing specific health priorities, responding to humanitarian crises, and piloting innovative service delivery models.

Key employers in this domain include major UN bodies such as the World Health Organization (WHO), the United Nations Office for Project Services (UNOPS), and the United Nations Population Fund (UNFPA), which manage large-scale health programs and recruit technical experts for a variety of roles.<sup>28</sup> Their vacancies are frequently advertised on specialized international platforms like UNJobNet, Impactpool, and ReliefWeb.<sup>31</sup>

Alongside the UN, a vibrant community of international NGOs (INGOs) and local NGOs are significant employers. Organizations like Project HOPE, Amref Health Africa, and Medical Teams International implement extensive programs focusing on areas such as HIV/AIDS, maternal and child health (MNCH), nutrition, and emergency response.<sup>34</sup> A common operational modality for these organizations, particularly in crisis contexts, is the deployment of Mobile Health and Nutrition Teams (MHNTs), which require a multi-disciplinary team of nurses, nutritionists, and community mobilizers to deliver care in remote or conflict-affected areas.<sup>36</sup> The demand for personnel in this sector is visible across numerous Ethiopian job portals, including EthioNGOJobs and GeezJobs, which list a constant stream of vacancies for roles ranging from field-level officers to senior program managers.<sup>37</sup>

A defining characteristic of employment in this ecosystem is its "projectized" nature. The vast majority of roles are tied to specific, donor-funded projects with finite timelines and objectives. This creates a parallel labor market distinct from the permanent civil service. Employment is typically offered on fixed-term contracts, with compensation that is often significantly higher than in the public sector and sometimes pegged to foreign currencies, but which lacks long-term stability.<sup>38</sup> Furthermore, the required skill set often extends beyond clinical competence to include project management, monitoring and evaluation (M&E), donor reporting, and grant management—competencies that are not central to the traditional public sector career track.<sup>41</sup>

This project-based model, while essential for flexible and rapid response, poses a long-term challenge to the sustainability of the national workforce. When a project concludes, the skilled and experienced staff who were trained and employed may face unemployment or move to another short-term project, often with a different organization in a different region. This cycle can prevent the deep, long-term embedding of their expertise within local health systems. While the NGO sector is a crucial source of employment and innovation, a key strategic challenge for the country is to develop mechanisms to better transition these highly skilled, project-trained professionals into the permanent public and private health systems, ensuring their valuable expertise is retained and contributes to strengthening the national workforce in a sustainable manner.

## **2.4 Community and Traditional Systems: The Informal Safety Net**

Operating in parallel to the formal health and social service systems is a vast, deeply rooted, and highly utilized informal care economy. This domain is founded on centuries-old cultural practices and robust community structures, serving as the primary source of care and support for a large segment of the Ethiopian population, particularly in rural areas.

The most prominent component of this informal system is traditional medicine. An estimated 80% of the population relies on traditional remedies, which encompass a wide range of practices including herbalism, spiritual healing, and bone-setting, as their first port of call for health issues.<sup>43</sup> This reliance is driven by cultural entrenchment, accessibility, and affordability, especially in areas where modern medical services are scarce.<sup>43</sup> Another key cadre within this system is the Traditional Birth Attendant (TBA). Despite national efforts to promote skilled birth attendance, TBAs remain a major provider of delivery care, with studies indicating that nearly 30% of mothers, particularly in poorer and more remote communities, utilize their services.<sup>46</sup> Their role is often deeply intertwined with cultural rituals surrounding childbirth, making them a preferred choice for many families.<sup>48</sup>

Beyond individual practitioners, the informal care economy is powerfully organized through community-based institutions, most notably the *iddir*. Traditionally established as burial societies to provide mutual financial and social support to

member families during times of bereavement, *iddirs* are a ubiquitous and highly trusted form of social insurance across both urban and rural Ethiopia.<sup>49</sup> Their functions have expanded over time to include support during illness and involvement in community development projects.<sup>49</sup>

A significant and strategic trend is the increasing recognition and formal integration of these informal systems into the national health architecture. This represents a pragmatic approach by the government and its partners to leverage existing, trusted community structures to achieve public health goals. This blurring of the lines between the formal and informal sectors is creating a new and uniquely Ethiopian tier of the Lavender Economy. For example, organizations like KNCV Tuberculosis Foundation and Hospice Ethiopia are now formally partnering with *iddirs*, training their leaders and volunteers to act as a quasi-formal cadre of community health workers.<sup>51</sup> These trained

*iddir* members are tasked with critical public health functions like conducting household TB contact tracing and providing basic community-based palliative care and support for the terminally ill.<sup>51</sup>

This integration creates new, often volunteer or stipend-based, roles within the care economy. It transforms *iddir* leaders from community organizers into trained health advocates. Similarly, while the long-term policy goal is to replace TBAs with skilled professionals, their persistent high utilization suggests that a more effective interim strategy may involve their integration into the formal system. Training TBAs to act as community health promoters, birth companions, or referral agents who link pregnant women to formal facilities could be a powerful way to bridge the gap between traditional practices and modern healthcare. This evolution demonstrates that the informal sector is not an obstacle to be overcome, but a vital asset that can be strategically engaged, regulated, and supported to expand the reach of the Lavender Economy and improve health outcomes for all.

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## Part III: A Nationwide Occupational and Skills Analysis

Ethiopia's Lavender Economy is composed of a diverse array of occupations, each with specific roles, required competencies, and employment contexts. A granular

analysis of these roles, drawn from programmatic documents and job market advertisements, provides a detailed picture of the skills in demand across the nation. This section breaks down the workforce into key professional categories, examining the distinct requirements and operational realities for each.

### 3.1 The Primary and Clinical Healthcare Workforce

This cadre forms the core of the formal health system, delivering direct patient care in public, private, and NGO facilities. The roles vary significantly based on the level of the health system and the nature of the employer.

155. **Physicians, Nurses, Midwives, and Health Officers:** These professionals are the backbone of clinical service delivery. In the public sector, they staff health centers and hospitals, providing a range of services from primary care to specialized surgery.<sup>15</sup> In the private sector, they work in clinics and hospitals, such as Teklehaimanot General Hospital in Addis Ababa, where roles like Professional Nurse, Midwife, and specialist physicians are common.<sup>25</sup> The NGO and international sector also employs these professionals, often in highly specialized contexts. For instance, the International Organization for Migration (IOM) hires nurses for its Migration Health Assessment Clinic in Addis Ababa, a role that involves specific protocols for medical exams, ID verification, and medical escort duties for refugees and migrants.<sup>53</sup> NGOs like CARE often hire Comprehensive Nurses or Midwives for field-based projects, where the role extends beyond clinical duties to include community mobilization, training of Health Extension Workers, and project reporting.<sup>54</sup>

156. **Health Extension Workers (HEWs):** This unique, female-only cadre is employed exclusively by the public sector and is stationed at the community level in health posts. Their work is foundational, focusing on delivering a package of 18 essential preventive and basic curative services, including health education, immunizations, and maternal and child health promotion.<sup>15</sup>

#### Competency Profile:

- **Technical Skills:** Core clinical competencies are paramount, including patient assessment, diagnosis, medication administration, wound care, antenatal and postnatal care (ANC/PNC), family planning counseling, and immunization

delivery.<sup>25</sup>

- **Soft Skills:** Strong communication, empathy, teamwork, and adherence to confidentiality are universally required. In community-facing roles, gender sensitivity and the ability to build trust with local populations are crucial.<sup>53</sup>
- **Advanced and Context-Specific Skills:** Roles in the NGO sector often demand additional skills in community action planning, training facilitation, and detailed reporting.<sup>54</sup> Positions with international bodies may require computer literacy and adherence to strict international protocols.<sup>53</sup>

### 3.2 Public Health and Health Education Professionals

This group focuses on population-level health, working to prevent disease and promote healthy behaviors. They are employed across government institutions, research bodies, and non-governmental organizations.

- **Public Health Officers, Epidemiologists, and Health Promotion Specialists:** These professionals are typically employed by the Ministry of Health, the Ethiopian Public Health Institute (EPHI), Regional Health Bureaus, and large NGOs.<sup>55</sup> Their work involves managing disease surveillance systems, coordinating public health programs (e.g., for malaria or HIV), conducting epidemiological research, and designing health education campaigns.<sup>58</sup> High-level roles, such as a Senior Health Specialist consulting for the MoH, require extensive experience (15+ years) in program implementation, resource mobilization, and health system support.<sup>60</sup> More entry-level roles, like Data Enumerators for health surveys, are often offered on a contract basis across multiple regions.<sup>56</sup>

#### Competency Profile:

- **Technical Skills:** A strong foundation in epidemiology, biostatistics, and public health methodologies is essential. Practical skills include survey design and implementation (familiarity with tools like the Demographic and Health Survey is an advantage), data analysis using software like SPSS or Stata, and monitoring and evaluation (M&E) of health programs.<sup>56</sup>
- **Digital Skills:** Proficiency with Health Management Information Systems (HMIS), particularly DHIS2, is increasingly a core requirement. Skills in data visualization and digital data collection are also highly valued.<sup>63</sup>

- **Soft Skills:** Advanced analytical capabilities, strong report writing, advocacy skills, and the ability to coordinate effectively with a wide range of government and non-government stakeholders are critical for success.<sup>58</sup>

### 3.3 The Mental Health and Psychosocial Support (MHPSS) Workforce

Driven by the National Mental Health Strategy and significant humanitarian needs, the MHPSS workforce is a rapidly expanding segment of the Lavender Economy. Employment is concentrated in the NGO sector, with a nascent private practice market emerging.

- **Psychologists, Psychiatrists, and Counselors:** These roles are found in both clinical and community settings. NGOs like Médecins du Monde (MdM) hire Psychologists (requiring an MSc or BSc degree) for field locations like Woldiya to conduct psychological assessments and deliver individual and group interventions.<sup>64</sup> Psychiatrists are primarily employed in tertiary public hospitals and a few private centers.
- **MHPSS Officers and Community Mental Health Workers:** These are common roles in the humanitarian sector. An MHPSS Officer, employed by organizations like Medical Teams International (MTI) or the Organization for Welfare and Development in Action (OWDA), is typically responsible for integrating MHPSS into primary healthcare, providing counseling for trauma and GBV survivors, and training local health workers.<sup>41</sup> A Community Mental Health Worker, a role often filled by individuals with a diploma or degree in psychology or social work, works directly in communities providing Psychological First Aid (PFA), psycho-education, and adherence counseling for patients with co-morbidities like HIV/TB.<sup>66</sup>

#### Competency Profile:

157. **Technical Skills:** Core competencies include Psychological First Aid (PFA), trauma-informed care, various counseling techniques (individual, group), case management, and an understanding of child protection principles. Familiarity with the mhGAP framework is a significant asset.<sup>64</sup>
158. **Soft Skills:** This field places a premium on soft skills. Empathy, active listening, cultural sensitivity, strict adherence to confidentiality, personal resilience, and



effective stress management are non-negotiable requirements for working with vulnerable and traumatized populations.<sup>66</sup>

159. **Advanced Skills:** More senior roles require the ability to develop culturally appropriate psycho-educational materials and to train and supervise community volunteers or other health workers, acting as a force multiplier for MHPSS services.<sup>41</sup>

### 3.4 Social Services and Community Support Professionals

This workforce is the primary implementer of the National Social Protection Policy, working directly with vulnerable individuals, families, and communities. Employment is predominantly within NGOs, community-based organizations (CBOs), and government social affairs bureaus.

- **Social Workers and Case Managers:** These professionals are central to providing direct support. A Social Worker in a development context, such as with the local NGO TSD, focuses on conducting community needs assessments, providing counseling, and building partnerships with local stakeholders in regions like Oromia.<sup>68</sup> In a humanitarian context, a Social Worker with an organization like NMWEO will focus on case management for vulnerable women and girls, providing psychosocial support, and ensuring strict adherence to safeguarding and Prevention of Sexual Exploitation and Abuse (PSEA) policies.<sup>69</sup>
- **Community Development and Community-Based Social Workers:** These roles are intensely field-oriented. A Community-Based Social Worker for an INGO like Save the Children acts as a case manager for specific populations, such as migrant and returnee children. The role involves the full case management cycle—identification, assessment, referral, and follow-up—and a key function is to establish and strengthen community-based child protection mechanisms at the *woreda* level.<sup>42</sup>

#### Competency Profile:

- **Technical Skills:** Expertise in the case management cycle is fundamental. This includes skills in participatory needs assessment, developing and implementing care plans, knowledge of local referral pathways for legal, health, and protection services, and a deep understanding of child protection and GBV principles.<sup>42</sup>

- **Soft Skills:** Excellent interpersonal and communication skills are essential for building rapport with beneficiaries and stakeholders. Advocacy, negotiation, and strong report-writing skills are also key requirements.<sup>42</sup>
- **Alternative Pathways:** The sector values practical experience. Job advertisements explicitly note that documented voluntary service experience is considered an asset, signaling a viable pathway for individuals who may not have a formal degree but possess relevant community experience.<sup>68</sup>

### 3.5 The Childcare, Elderly, and Palliative Care Workforce

This sub-sector is characterized by a mix of formal employment in specialized centers and a large, often informal, home-based care workforce. It is an area with significant potential for formalization and professionalization.

- **Childcare Professionals:** Formal roles include the **Lead Child Caregiver**, who supervises staff in a residential setting like an NGO-supported reunification home. This role requires skills in trauma-informed care, child development, and staff scheduling.<sup>71</sup> A related and growing niche is the **Childcare Trainer**, a role found in private vocational centers like Efoy Nanny and Housekeeping Training Center. These trainers, who often have a clinical nursing background, are responsible for professionalizing the nanny and caregiver workforce by teaching essential skills in childcare, health, and safety.<sup>72</sup>
- **Elderly and Palliative Care Workers:** This is a nascent but growing field. Formal employment exists in a few private nursing homes, primarily in Addis Ababa.<sup>73</sup> More common are roles for **Private Nurses for Elderly Care**, often sourced through recruitment agencies like GeezJobs. These nurses provide a mix of medical monitoring, medication management, personal care, and companionship in a client's home.<sup>74</sup> The palliative care workforce is still in its infancy, largely driven by NGOs like Hospice Ethiopia and community initiatives involving trained volunteers.<sup>52</sup>

#### Competency Profile:

- **Technical Skills:** Depending on the role, required skills include geriatric care principles, pediatric development milestones, palliative care philosophies, medication administration, nutrition management, hygiene assistance, and

trauma-informed practices for children.<sup>71</sup>

- **Soft Skills:** Compassion, patience, reliability, and strong communication skills with both clients and their families are paramount. The ability to provide emotional support and companionship is a core function, especially in elderly care.<sup>71</sup>
- **Market Trend:** The emergence of formal training centers for caregivers and the demand for private home-care nurses indicate a clear market trend towards the professionalization of caregiving. This creates significant opportunities for the development of accredited vocational training programs to upskill the informal care workforce.

### 3.6 The Disability Services Workforce

This specialized field is dedicated to the empowerment and support of persons with disabilities. Employment is concentrated within dedicated local and international NGOs, specialized rehabilitation centers, and inclusive education programs.

- **Key Roles (Inferred from Organizational Missions):** While specific job postings were limited in the research material, the mandates of key organizations like the Ethiopian Center for Disability and Development (ECDD), Cheshire Ethiopia, and Help for persons with Disabilities Organization (HPDO) point to a range of specialized roles.<sup>77</sup> These include:
  - **Rehabilitation Therapists:** Primarily physiotherapists and occupational therapists working in centers like Cheshire Ethiopia's pediatric rehabilitation facilities.<sup>78</sup>
  - **Prosthetics and Orthotics Technicians:** Skilled professionals who design, fit, and maintain assistive devices.
  - **Special Needs Educators:** Teachers with specialized training to work in inclusive education settings.
  - **Community-Based Rehabilitation (CBR) Workers:** Field staff who implement CBR strategies, a key approach for organizations like HPDO, to address the needs of persons with disabilities within their communities.<sup>79</sup>
  - **Advocacy and Accessibility Officers:** Professionals who work on policy change, rights-based advocacy, and consulting on making environments and services accessible.<sup>80</sup>

## Competency Profile:

- **Technical Skills:** These are highly role-specific and include physiotherapy techniques, fitting of assistive technologies, special needs pedagogy, CBR methodologies, and knowledge of universal design principles.<sup>77</sup>
- **Soft Skills:** The sector's strong focus on a rights-based approach means that advocacy, empowerment, and respectful communication are as important as technical skills. Patience and the ability to work collaboratively with persons with disabilities and their families are essential.<sup>80</sup> Employment in this field requires not just technical know-how but a deep commitment to social inclusion.

### 3.7 Ancillary, Administrative, Research, and Policy Roles

The effective functioning of the Lavender Economy depends on a wide range of ancillary and support professionals who work behind the scenes in administration, logistics, research, and policy.

- **Laboratory and Pharmacy Professionals:** This includes Medical Laboratory Technologists, Pharmacists, and Druggists. They are employed in public and private hospitals, clinics, and retail pharmacies.<sup>27</sup> Critically, analysis of national workforce data reveals a severe and policy-acknowledged shortage of laboratory technologists and pharmacists in the public sector, making these qualifications highly sought after.<sup>82</sup>
- **Health Administration and Management:** These roles include Hospital Administrators, Human Resource Officers, Finance Officers, and Procurement and Logistics Officers. They are essential for the management of health facilities and NGO programs.<sup>40</sup>
- **Health Research and Policy:** This category includes Researchers, Research Coordinators, and Data Analysts, who are often employed by academic institutions and research bodies like EPHI.<sup>61</sup> It also includes Policy Analysts, Monitoring and Evaluation (M&E) Specialists, and Grant Writers, who are crucial for the functioning of government ministries and NGOs.<sup>18</sup>

The demand for these ancillary roles underscores the complexity of the care economy. It is not just comprised of frontline caregivers but requires a deep bench of managers, technicians, and analysts to support a functioning health and social care

system.

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## Part IV: The Emerging Digital Frontier in Care

A pivotal transformation is underway within Ethiopia's Lavender Economy: the rise of a digital health sub-sector. Driven by a confluence of national strategic vision, private sector innovation, and increasing connectivity, this emerging frontier is creating new service delivery models and a new category of employment opportunities. While still nascent and facing significant challenges, the digital health ecosystem represents one of the most dynamic and high-potential growth areas for the nation's care workforce.

### 4.1 The National Digital Health Blueprint: The Strategic Driver

The growth of digital health in Ethiopia is not an ad-hoc phenomenon but a deliberate, policy-driven endeavor. The government's overarching "Digital Ethiopia 2025" strategy provides the national vision, while the Ministry of Health's specific "Digital Health Blueprint" (2021) serves as the guiding framework for the sector's transformation.<sup>84</sup> This blueprint outlines a roadmap for leveraging technology to improve healthcare access, quality, and efficiency.

The strategy prioritizes several key interventions that directly translate into a demand for new and evolving job roles within the Lavender Economy <sup>84</sup>:

- **Remote Health Care Delivery:** The formal endorsement of both client-to-provider and provider-to-provider telemedicine creates a direct need for clinicians willing to practice remotely and for **Telemedicine Coordinators** to manage these services.
- **Digital Health Payments:** The push to digitize payments, particularly for Community-Based Health Insurance (CBHI) and revenue collection, generates demand for specialists at the intersection of financial technology (fintech) and health financing.
- **Data Exchange and Interoperability:** A core focus of the blueprint is enabling

different health information systems to communicate. This requires a specialized workforce of **Health Informatics Specialists, Data Engineers**, and experts in international health data standards like HL7 and FHIR.

- **Point of Care (POC) and AI Technologies:** The strategy encourages investment in disruptive technologies, including AI-driven diagnostics. This signals a future need for **Biomedical Engineers** and **Data Scientists** with a specialization in health applications.<sup>5</sup>
- **Electronic Health Information Systems (e-HIS):** The ongoing digitization of health records through platforms like the District Health Information System 2 (DHIS2) and the electronic Community Health Information System (eCHIS) necessitates a workforce skilled in the implementation, management, and analysis of these large-scale systems.<sup>63</sup>

## 4.2 The Telehealth and e-Health Employment Landscape

While policy provides the framework, the tangible employment opportunities in digital health are currently being created by a small but vibrant cluster of private companies and startups. These pioneers are building the platforms and services that constitute Ethiopia's emerging telehealth market.

160. **Key Employers:** The leading players in this space are primarily based in Addis Ababa. They include **TenaFirst**, which offers a platform for booking virtual appointments with a wide range of specialists; **Liyana Digital Health**, one of the first licensed telehealth companies, providing virtual consultations, a 24/7 call center, and home-based care coordination; **Tele Health Ethiopia**, which focuses on leveraging AI-powered chatbots and low-bandwidth solutions; and **TENAWO Digital Health**, which is pioneering e-pharmacy services alongside telemedicine.<sup>86</sup>
161. **Emerging Roles and Employment Models:** These companies are generating a new set of job roles and flexible work arrangements:
  1. **Platform-Based Clinicians:** A significant opportunity for doctors, specialists, psychologists, and therapists to engage in "gig work," offering consultations remotely on a part-time or flexible basis, supplementing their income from traditional practice.<sup>86</sup>
  2. **Telehealth Coordinators and Managers:** Full-time administrative and

managerial roles responsible for the day-to-day operations of the digital platforms, including scheduling, client relations, and quality assurance.

3. **eHealth and Health Informatics Specialists:** These are the core technical roles. Job advertisements for positions like **Regional Health Information System /Digital Health Consultant** and **Data Engineer, Public Health** reflect the growing demand for professionals who can manage digital health platforms, ensure data security and interoperability, and analyze the data generated.<sup>56</sup>
4. **Digital Support Staff:** Roles such as **Digital Marketers, Customer Service Agents,** and **App Support Specialists** are crucial for user acquisition, retention, and ensuring a smooth user experience on these new platforms.

### 4.3 The Challenge of the Digital Divide

While the digital health frontier holds immense promise for transforming care delivery and creating high-value jobs, its current trajectory presents a significant risk of exacerbating existing inequalities. The growth of this sub-sector could inadvertently deepen the chasm between the urban, affluent population and the rural, underserved majority.

This risk stems from the profound digital divide that characterizes the country. The Ministry of Health's own field reviews starkly illustrate this disparity: urban centers like Addis Ababa boast reliable data connectivity and high smartphone penetration, creating a fertile ground for app-based digital health services. In contrast, "deep rural" areas are characterized by limited smartphone ownership, a predominance of basic feature phones, and inconsistent network coverage and power supply.<sup>85</sup>

The current business models of emerging telehealth companies are naturally tailored to the more commercially viable urban market. Their platforms are typically app-based, requiring smartphones and reliable internet, and their marketing efforts are concentrated in the capital.<sup>86</sup> Consequently, the new, high-skilled jobs being created—in health informatics, platform management, and specialized remote consultation—are almost exclusively located in Addis Ababa or are remote roles that still require a level of infrastructure and digital literacy unavailable in most of the country.<sup>63</sup>



Without deliberate and strategic policy interventions, the digital health revolution risks bypassing the very communities that stand to benefit most from it. This runs directly counter to the national health policy's goals of equity and universal coverage. To mitigate this, a concerted effort is needed to bridge the digital divide. This could include public investment in rural digital infrastructure, the promotion and subsidization of low-bandwidth health solutions (such as USSD-based services and dedicated health call centers), and the creation of new workforce cadres like a "Digital Health HEW," who could be equipped with tablets and basic diagnostic tools to act as a digitally-enabled link between remote communities and the formal health system. Ensuring that the growth of the digital health economy is inclusive is one of the most pressing challenges and opportunities facing Ethiopia's Lavender Economy today.

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## **Part V: Workforce Dynamics: Compensation, Contracts, and Career Pathways**

The viability and sustainability of Ethiopia's Lavender Economy are fundamentally shaped by the economic and professional realities faced by its workforce. The dynamics of compensation, the nature of employment contracts, and the accessibility of career development pathways determine the sector's ability to attract, retain, and motivate skilled professionals. Analysis reveals a deeply fractured landscape, defined by a stark contrast between a struggling public sector and a more dynamic, albeit less stable, private and non-governmental sphere.

### **5.1 Compensation and Market Intelligence**

The single most critical factor defining the employment landscape of Ethiopia's Lavender Economy is the crisis in public sector compensation. The salaries offered to government health workers are profoundly disconnected from the cost of living and the regional market, creating a powerful driver of attrition, low morale, and workforce imbalance.

162. **Public Sector Compensation:** The data reveals an alarming erosion of real income for public health professionals. An average physician in the public sector earns a mere **\$94 per month (approximately 12,220 ETB)**, while a nurse may earn as little as **\$50 per month**.<sup>92</sup> This is dramatically lower than in comparable low-income countries in the region.<sup>92</sup> The impact of currency devaluation has been devastating; a senior consultant physician with nearly two decades of experience now earns the same US dollar equivalent as a junior doctor did twenty years ago, despite a 25-fold increase in their nominal salary in Ethiopian Birr.<sup>94</sup> The official public sector salary scale for higher-level health professionals confirms these low figures, with a top-tier professional at Grade XII, Step 9 earning a ceiling of just **9,973 ETB per month**.<sup>95</sup> This compensation is insufficient to cover basic living expenses, particularly in urban areas where housing and food costs have surged.<sup>94</sup>
163. **Private and NGO Sector Compensation:** While comprehensive salary scales for the private and NGO sectors are not publicly available, evidence from job advertisements and programmatic documents clearly indicates a significant positive differential. For example, a position for a private nurse providing elderly care in Addis Ababa was advertised with a net salary of **8,000 ETB per month**, a figure that is competitive with or exceeds the gross salary for many experienced public sector professionals.<sup>74</sup> A psychologist role with an NGO offered a basic salary of **18,359 ETB per month**, more than double the entry-level public scale.<sup>67</sup> It is widely understood that roles with UN agencies and major international NGOs offer substantially higher compensation, often pegged to the US dollar, creating a massive pay disparity that the public sector cannot compete with.

This extreme compensation differential has created what is effectively a two-tier workforce and labor market. One tier consists of a low-paid, high-volume, and increasingly demoralized public sector workforce, which provides the bulk of services to the majority of the population. The other tier is a smaller, better-paid, but often more precarious workforce in the private and NGO sectors, concentrated in urban areas and specific projects. This bifurcation is the most powerful force shaping career decisions in the Lavender Economy. It systematically incentivizes experienced professionals to leave the public system, undermining the government's own significant investments in their training and compromising the quality and stability of public health services. Addressing this compensation crisis is not merely a human resources issue; it is a fundamental prerequisite for achieving Ethiopia's national

health goals.

## 5.2 Contract Arrangements and Employment Types

The Lavender Economy offers the full spectrum of employment arrangements, with the type of contract heavily dependent on the employing sub-sector.

164. **Full-Time Permanent:** This is the standard arrangement within the public sector (for civil service positions) and for core staff in established private hospitals and companies. It offers the highest degree of job security but is coupled with the low compensation levels detailed above.<sup>72</sup>
165. **Fixed-Term Contracts:** This is the dominant employment model in the NGO and development partner sector. Contracts are tied to specific project funding cycles and can range from a few months to several years.<sup>38</sup> This model provides higher pay but introduces significant career precarity.
166. **Freelance and Consultancy:** This arrangement is common for highly skilled, senior experts who are hired for specific technical assignments, such as policy analysis, program evaluation, or specialized training delivery. Both the government (via consulting firms) and NGOs utilize this model.<sup>56</sup>
167. **Part-Time and Gig Work:** This is an emerging model, primarily driven by the new digital health platforms. It allows clinicians to offer virtual consultations on a flexible, per-session basis, providing a new avenue for supplementary income.<sup>86</sup>
168. **Internships and Volunteer Roles:** These serve as a critical entry point into the sector, particularly for recent graduates. NGOs like Amref and GIZ, as well as UN agencies, frequently offer structured internship programs. Volunteer experience is often explicitly recognized as an asset in job applications for paid positions, creating an important alternative pathway into the workforce.<sup>38</sup>
169. **Informal Work:** This remains the most prevalent form of employment in areas like home-based caregiving for the elderly and children, as well as in the practice of traditional medicine. This work is characterized by a lack of formal contracts, regulation, and social protection.<sup>99</sup>

## 5.3 Educational and Professional Development Pathways

Entry into and progression within the Lavender Economy occurs through a combination of formal education, vocational training, and continuous professional development, with alternative pathways gaining recognition.

170. **Formal Education:** The primary pathway for professional roles is through the university system. Institutions like Addis Ababa University, the University of Gondar, and Jimma University are the main producers of the nation's doctors, nurses, pharmacists, public health officers, psychologists, and social workers.<sup>101</sup> Curricula for key professions like Social Work and Psychology are becoming increasingly standardized, often including modules on core practice areas such as health social work, case management, and community practice.<sup>105</sup>
171. **Vocational Training (TVET):** Technical and Vocational Education and Training (TVET) institutions play a crucial role in preparing mid-level cadres. There is a growing market for private vocational centers that provide specialized training for roles like professional nannies and caregivers, often with a curriculum focused on practical skills in child health, safety, and development.<sup>72</sup> Digital platforms like HahuJobs are also beginning to specifically target and connect TVET graduates with employers.<sup>109</sup>
172. **Professional Associations and CPD:** Once in the workforce, professional development is structured through Continuous Professional Development (CPD), which is mandatory for license renewal.<sup>110</sup> Professional associations, such as the Ethiopian Medical Association (EMA), Ethiopian Nurses Association (ENA), Ethiopian Public Health Association (EPHA), Ethiopian Psychologists' Association (EPA), and the Ethiopian Society of Sociologists, Social Workers and Anthropologists (ESSWA), are the key providers and accreditors of these CPD activities. They also function as vital professional networks and hubs for job information.<sup>55</sup>
173. **Alternative Pathways:** Formal degrees are not the only route to employment. Practical experience is highly valued, particularly in the NGO and private sectors. Job advertisements for social work roles, for example, explicitly state that documented volunteer experience is an "added value".<sup>68</sup> In some private sector roles, such as home-based elderly care, relevant experience can be considered in lieu of a formal nursing degree, opening doors for experienced but non-degreed caregivers.<sup>74</sup>

The following table provides a comparative summary of the key characteristics of employment across the major sub-sectors of Ethiopia's Lavender Economy.

Table 1: Comparative Analysis of Employment Opportunities by Sub-Sector

| Sub-Sector | Representative Job Titles | Typical Employers | Primary Geographic Locus | Required Formal Qualification | Key Differentiating Skills | Typical Contract Type | Estimated Compensation Range (ETB/Month) |

| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |

| Primary Clinical Care (Public) | Health Extension Worker, Nurse, Midwife, General Practitioner | Ministry of Health (MoH), Regional Health Bureaus (RHB) | Nationwide (Rural/Woreda, Urban) | Certificate, Diploma, BSc, MD | Community Mobilization, Basic Curative/Preventive Care | Permanent (Civil Service) | 3,000 - 12,000 |

| Primary Clinical Care (Private) | General Practitioner, Specialist Physician, Nurse | Private Hospitals (e.g., Teklehaimanot), Medium Clinics | Urban Centers (esp. Addis Ababa) | BSc, MD, MD+Specialty | Patient Management, Customer Service, Specialized Clinical Skills | Permanent / Part-Time | 10,000 - 40,000+ |

| Mental Health & Psychosocial Support (MHPSS) | MHPSS Officer, Psychologist, Community Mental Health Worker | INGOs (e.g., MSF, MDM), UN Agencies, Local NGOs | Humanitarian Zones, Refugee Camps, Urban Centers | Diploma, BSc/MSc Psychology, Psychiatric Nursing | Case Management, Psychological First Aid (PFA), Trauma-Informed Care | Fixed-Term Contract | 15,000 - 35,000+ |

| Social Services & Community Support | Social Worker, Case Manager, Community Development Officer | NGOs (e.g., Save the Children), CBOs, MoWSA | Project-Specific Woredas, Urban Slums | BA Social Work/Sociology | Case Management Cycle, Community Mobilization, Child Protection/GBV | Fixed-Term Contract | 12,000 - 25,000 |

| Digital Health & Telehealth | Health Informatics Analyst, Telemedicine Coordinator, eHealth Specialist | Private Startups (e.g., Liyana, TenaFirst), MoH/EPHI | Addis Ababa, Remote (Global) | BSc/MSc Health Informatics, IT, Public Health | Data Analytics, DHIS2, Telehealth Platforms, System Interoperability | Permanent / Consultancy | 25,000 - 60,000+ |

| Elderly & Home-Based Care | Private Nurse, Home Health Aide, Caregiver | Private Clients, Home Care Agencies (e.g., Redat), Nursing Homes | Urban Centers | Certificate, Diploma, Nursing Degree (or experience) | Geriatric Care, Palliative Care Principles, Companionship, Personal Care | Informal / Part-Time / Permanent | 8,000 - 20,000 |

| Childcare Services | Child Caregiver, Nanny, Early Childhood Educator | Private Households, NGOs, Daycare Centers, Training Centers | Urban Centers | Certificate, Diploma (e.g., Nursing) | Child Development, Trauma-Informed Care, First Aid, Hygiene | Informal / Permanent | 5,000 - 15,000 |

| Disability Services | Rehabilitation Therapist, CBR Worker, Special Needs Educator | Specialized NGOs (e.g., ECDD, Cheshire), Rehabilitation Centers | Project-Specific Regions, Urban Centers | BSc Physiotherapy, BA Special Needs Ed. | Community-Based Rehabilitation (CBR), Assistive Tech, Inclusive Pedagogy | Fixed-Term Contract / Permanent | 10,000 - 25,000 |

| Health Research & Policy | M&E Specialist, Policy Analyst, Researcher | Research Institutes (EPHI), Universities, INGOs, MoH | Addis Ababa | MA/MSc/PhD Public Health, Economics, etc. | Grant Writing, Data Analysis (Stata/SPSS), Policy Formulation | Permanent / Consultancy |

20,000 - 50,000+ |

| Humanitarian Emergency Response | Emergency Nurse, Nutrition Officer, Mobile Health Team Lead | UN Agencies (WFP, UNICEF), INGOs (e.g., Medical Teams Int'l) |

Conflict/Drought/Disaster Affected Regions | Diploma/BSc Nursing, Nutrition, Public Health | Emergency Triage, CMAM/SAM Management, Rapid Response | Short-Term Contract |

20,000 - 45,000 (often with allowances) |

*Note: Compensation ranges are estimates based on available data from job postings and reports and are subject to significant variation based on employer, experience, and specific location. Public sector salaries are notably at the lowest end of these ranges.*

The distribution of employment opportunities and skilled professionals within Ethiopia's Lavender Economy is profoundly uneven. National averages for workforce density and service availability mask deep geographic cleavages, primarily between urban and rural areas, but also across the country's diverse regions. This spatial inequality is a critical barrier to achieving the national goal of equitable access to care and shapes the labor market into distinct zones of opportunity and scarcity.

## 6.1 The Urban-Rural Chasm: Concentration vs. Extension

The most pronounced disparity in the care sector labor market is the chasm between urban centers and rural areas. These two contexts represent fundamentally different employment ecosystems.

174. **Urban Centers (Addis Ababa, Dire Dawa, and Regional Capitals):** These cities, particularly the capital, function as concentrated hubs of employment and specialized services. Addis Ababa is the epicenter of the private health sector, hosting 25 of the nation's 31 private hospitals.<sup>23</sup> It is also the headquarters for nearly all major international NGOs, UN agencies, and the burgeoning digital health startups.<sup>26</sup> Consequently, job opportunities for specialized clinical roles (e.g., Radiologist, Gynaecologist, Anesthesiologist), advanced technical positions (e.g., Health Informatics Specialist, Data Engineer), and senior managerial roles are overwhelmingly concentrated in these urban areas.<sup>25</sup> This concentration creates a vibrant, competitive market for skilled professionals but simultaneously drains talent from the rest of the country.

175. **Rural Areas:** In stark contrast, the employment landscape in rural Ethiopia is

dominated by the public sector. The primary employer is the government, and the cornerstone of service delivery is the Health Extension Program (HEP).<sup>15</sup> The quintessential rural care sector job is that of the Health Extension Worker (HEW), a generalist community health worker based in a local health post. Beyond the HEP, other opportunities in rural areas are typically limited and often tied to the specific geographic footprint of an NGO's development or humanitarian project, offering employment for roles like community-based social workers or field officers on a temporary basis.<sup>42</sup> The diversity and specialization of roles found in urban centers are largely absent from the rural labor market.

## 6.2 Regional Workforce Density and "Health Deserts"

Beyond the urban-rural divide, there is significant variation in workforce distribution across Ethiopia's administrative regions. While the country's overall health professional-to-population ratio was recently reported at 2.2 per 1,000, an improvement but still below the WHO's minimum threshold of 2.3, this national figure obscures the reality of severe regional imbalances.<sup>82</sup>

Historical data has shown this disparity in sharp relief. A study in the East Wollega Zone, for example, found a more than six-fold difference in health worker density between its best-served and worst-served *woredas* (districts), with ratios ranging from 1.888 down to a critically low 0.286 per 1,000 people.<sup>117</sup> More recent analyses confirm that this pattern persists on a larger scale. Health infrastructure, both public and private, is heavily concentrated in the large, populous, and relatively stable agrarian regions of Oromia, Amhara, and the former SNNPR.<sup>24</sup> Conversely, the pastoralist and historically marginalized regions, such as Afar, Somali, and Benishangul-Gumuz, along with conflict-affected areas like Tigray, face a chronic and acute shortage of health facilities and skilled personnel, creating vast "health deserts".<sup>4</sup>

This geographic imbalance gives rise to what can be conceptualized as a three-tiered labor market within the national Lavender Economy:

176. **Tier 1: The Core (Addis Ababa).** The capital functions as a national hub, possessing a unique concentration of the highest-paying and most specialized jobs. It is the center for advanced private healthcare, the headquarters for the



NGO and development partner community, and the incubator for the entire digital health sector. Career pathways here are the most diverse and lucrative.

**177. Tier 2: The Stable Periphery (Major Regional Towns and Agrarian Areas).**

This tier covers the large highland regions where the majority of the population resides. The labor market is dominated by the public sector, with employment structured around the network of government hospitals, health centers, and the Health Extension Program. Opportunities are more stable but less specialized and significantly lower-paying than in the core.

**178. Tier 3: The Humanitarian Frontier (Pastoralist, Conflict-Affected, and Remote Regions).**

In these areas, the formal public health system is often weak or disrupted. The labor market is characterized by scarcity and is dominated by short-term, project-based humanitarian roles. Employment is provided almost exclusively by UN agencies and INGOs responding to crises, focusing on emergency health, nutrition, and protection services.<sup>32</sup>

This three-tiered structure reveals that a health professional's career prospects, salary expectations, and required skill set are determined as much by their geographic location as by their qualifications. This reality requires highly differentiated and geographically-targeted strategies for workforce planning, recruitment, and retention to address the specific needs and market dynamics of each tier.

The following table provides a high-level overview of the regional disparities in health workforce and infrastructure, highlighting the different opportunity structures across the country.

Table 2: Regional Health Workforce Density and Opportunity Hotspots (Illustrative)

Region	Key Health Indicators (Illustrative)	Health Workforce Density (Illustrative)	Health Infrastructure (Illustrative)	Private Sector Presence	Observed Employment Hotspot / Primary Employment Type
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Region	Key Health Indicators (Illustrative)	Health Workforce Density (Illustrative)	Health Infrastructure (Illustrative)	Private Sector Presence	Observed Employment Hotspot / Primary Employment Type
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Addis Ababa	Low Maternal Mortality, High Population Density	Very High (e.g., 1 Physician per <1,000)	Numerous Specialized Public & Private Hospitals	High	Core Hub: Specialized Clinical, Private Sector, NGO HQ, Digital Health, Research/Policy
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Oromia	High Population, Moderate Maternal Mortality	Moderate (close to national average)	Extensive network of Health Centers & Posts, Zonal Hospitals	Medium	(concentrated in major towns)   Stable Periphery: Public Sector (Hospitals, Health Centers), Health Extension Program
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Amhara	High Population, High Disease Burden	Moderate (close to national average)			
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Extensive network of Health Centers & Posts, Zonal Hospitals | Medium (concentrated in major towns) | Stable Periphery: Public Sector (Hospitals, Health Centers), Health Extension Program |

| Somali | High Maternal/Child Mortality, Pastoralist Context | Very Low | Limited Hospitals and Health Centers, some Health Posts | Low | Humanitarian Frontier: NGO/UN Project-Based (Mobile Health Teams, Emergency Nutrition) |

| Afar | High Maternal/Child Mortality, Pastoralist Context | Very Low | Limited Hospitals and Health Centers, some Health Posts | Low | Humanitarian Frontier: NGO/UN Project-Based (Emergency Health, WASH) |

| Tigray | High needs due to recent conflict | Critically Low (recovering) | Damaged/recovering infrastructure | Low (recovering) | Humanitarian Frontier: NGO/UN-led Recovery & Emergency Response |

| Dire Dawa | Urban center, transport hub | High | Major Referral Hospital, Private Clinics | High | Core Hub (Secondary): Mix of Public Sector, Private Clinics, Logistics/Transport related health |

Note: This table is illustrative, synthesizing trends from multiple sources.<sup>4</sup> Precise, up-to-date, and disaggregated regional workforce density data is a recognized gap, and establishing a robust system for its collection is a key national priority.

Ethiopia's Lavender Economy stands at a pivotal crossroads. It is an ecosystem defined by immense potential, fueled by strong policy ambition, a growing supply of young and educated human capital, and pockets of remarkable dynamism in the private, non-governmental, and digital spheres. Yet, this potential is fundamentally constrained by deep-seated structural challenges. The path forward requires strategic, coordinated, and decisive action from all stakeholders to transform these challenges into opportunities for sustainable and equitable growth. This section synthesizes the report's core findings and provides a set of actionable recommendations for government, educational institutions, and development partners.

## **7.1 Synthesis of Findings: An Economy at an Inflection Point**

The comprehensive analysis of Ethiopia's care sector reveals a fundamental paradox: the nation's health and social policies are increasingly ambitious and aligned with global best practices, yet the workforce intended to implement them is destabilized by systemic weaknesses. The state-centric model, while providing a foundational

primary care network through the Health Extension Program, is under severe strain. A public sector compensation crisis has rendered government employment financially untenable for many professionals, leading to high attrition, low morale, and a critical "brain drain" of experienced personnel towards the private and NGO sectors.<sup>94</sup> This has created a dysfunctional, two-tier labor market that undermines the public system and exacerbates geographic inequities.

Simultaneously, the private, NGO, and emerging digital sectors are demonstrating significant dynamism. They are creating new jobs, pioneering innovative service models, and responding to unmet needs, particularly in urban centers and humanitarian contexts.<sup>22</sup> However, this growth is often fragmented, project-dependent, and geographically concentrated, raising concerns about sustainability and equity. The inflection point for Ethiopia's Lavender Economy lies here: in navigating the transition from a struggling state-centric model to a robust, well-regulated, mixed-market system where public, private, and community actors can work in concert to achieve national goals.

## 7.2 Identification of Critical Skills Gaps and High-Growth Niches

The occupational analysis highlights several areas where the demand for skilled professionals far outstrips the current supply, alongside niche areas poised for rapid growth. Addressing these gaps and cultivating these niches is essential for the sector's future development.

### Identified Critical Skills Gaps:

179. **Allied Health Professionals:** There is a critical, policy-acknowledged national shortage of **pharmacists and medical laboratory technologists**. The rapid expansion of medical doctor training was not matched by an equivalent scaling of these essential allied health cadres, creating a significant imbalance in the health workforce skill mix.<sup>82</sup>
180. **Mid-Level MHPSS Providers:** The ambition of the National Mental Health Strategy to integrate mental health into primary care has created a massive demand for mid-level providers. There is a profound gap in the number of trained and, crucially, supervised **psychiatric nurses, clinical psychologists, and counselors** needed to deliver mhGAP-based services and support frontline

health workers.<sup>12</sup>

181. **Geriatric and Palliative Care Specialists:** As Ethiopia's population ages and the burden of non-communicable diseases like cancer rises, there is a near-total absence of a formally trained workforce in **geriatric care, hospice care, and palliative medicine**. This is a major gap in the continuum of care, with services currently being provided ad-hoc by generalists or NGO volunteers.<sup>52</sup>
182. **Health Informatics and Digital Health Professionals:** The national push for digitalization has created an immediate and growing need for professionals skilled in **health information systems (especially DHIS2), electronic medical records (EMRs), health data analytics, and telehealth platform management**.<sup>63</sup>

### Identified High-Growth Niches:

- **Digital Health Services:** Telemedicine, e-pharmacy, and health-tech startups represent the most significant high-growth area, driven by private investment and increasing urban connectivity.<sup>86</sup>
- **Specialized MHPSS:** Within the broader mental health field, there is a growing niche for specialized services addressing trauma, gender-based violence (GBV), and substance abuse, particularly within the well-funded humanitarian sector.<sup>41</sup>
- **Private Elderly and Home-Based Care:** A distinct urban market is emerging for professional, private-pay caregiving services for the elderly and for patients requiring post-operative or chronic disease management at home.<sup>73</sup>
- **Vocational Caregiver Training:** The demand for skilled nannies and professional caregivers for children and the elderly is creating a corresponding market for private vocational training and certification centers, formalizing a previously informal sector.<sup>72</sup>

## 7.3 Strategic Recommendations

To unlock the potential of the Lavender Economy, targeted actions are required from all key stakeholders.

### 7.3.1 For Government (Ministry of Health, Ministry of Finance, Ministry of

## Education)

- **Address the Compensation Crisis (Urgent Priority):** The single most impactful intervention is to conduct an immediate and radical reform of the public sector health worker salary scale. This must go beyond marginal adjustments and aim to align compensation with the cost of living, regional market rates, and the value of these professionals. Critically, the salary structure must be "decompressed" to provide significant financial incentives for advanced training, specialization, and years of experience, thereby retaining senior experts in the public system.<sup>94</sup>
- **Strategically Steward the Public-Private Mix:** The government's role must evolve from being the primary service provider to being a more effective **steward and regulator** of a mixed health economy. This involves developing and enforcing clear regulations for the "dual practice" of clinicians in both public and private sectors to prevent the neglect of public duties.<sup>123</sup> Furthermore, policy tools (e.g., tax incentives, preferential loans, streamlined licensing) should be used to encourage private sector investment in geographically underserved regions and in service areas with critical gaps (like diagnostics and rehabilitation), rather than allowing concentration in already saturated urban markets.<sup>22</sup>
- **Modernize the Health Extension Program (HEP):** Actively implement the HEP transformation roadmap to adapt the program to the country's changing health needs.<sup>16</sup> This should include piloting the introduction of new, specialized community-level cadres—such as a **Community Nutrition Promoter** or a **Community MHPSS Liaison**—to work alongside generalist HEWs to specifically target the rising burden of malnutrition and NCDs.<sup>19</sup>
- **Bridge the Digital Divide for Health Equity:** To ensure the benefits of the digital health revolution are shared by all, the government must lead investments in rural digital infrastructure (connectivity and power). It should also promote and potentially subsidize the development of low-bandwidth telehealth solutions (e.g., USSD-based appointment systems, dedicated toll-free health advice lines) that do not depend on smartphones, thereby making digital health accessible to rural and poorer populations.<sup>85</sup>

### 7.3.2 For Educational and Training Institutions (Universities and TVETs)

- **Align Curricula with Critical Market Needs:** In direct response to identified workforce shortages, universities should work with the MoH and MoE to urgently **increase the intake and expand training capacity for pharmacists and medical laboratory technologists.**<sup>82</sup> Furthermore, universities should pioneer new, accredited degree and diploma programs in the high-demand, high-gap fields of **Geriatric Care, Palliative Care, and Health Informatics** to create the next generation of specialists.<sup>63</sup>
- **Integrate "Real-World" Skills into Curricula:** To enhance graduate employability, all health and social science curricula should integrate practical training in skills demanded by the modern care economy. This includes modules on **digital literacy (EMR/DHIS2), project management basics, grant writing fundamentals, and monitoring and evaluation,** which are essential for success in the dynamic NGO and digital health sectors.<sup>42</sup>
- **Develop and Formalize Vocational Pathways:** TVET colleges and private training institutions have a major opportunity to create a new skilled workforce by developing accredited, short-cycle (e.g., 6-12 month) vocational training and certification programs for roles with high market demand. Key areas for program development include **Professional Caregiver (for children and elderly), Disability Support Aide, and Community-Based Rehabilitation Worker.** This would formalize the informal care sector and provide a clear career ladder for thousands of individuals.

### 7.3.3 For Investors and Development Partners

- **Invest in "Last-Mile" Digital Health:** Shift investment focus from high-end, urban-centric apps towards innovative startups and social enterprises that are developing and deploying low-cost, low-bandwidth, and culturally appropriate digital health solutions specifically designed for rural and underserved populations.
- **Fund Strategic Workforce Development:** Provide targeted funding to universities and TVETs for the development and launch of new curricula in the identified critical skill gap areas (geriatrics, palliative care, health informatics, MHPSS supervision). Supporting "train-the-trainer" programs within these new disciplines can create a sustainable local capacity for workforce development.

- **Promote Sustainable Employment Models:** In program design and funding calls, shift the emphasis away from short-term, project-based hiring of individual staff. Instead, prioritize models that build institutional capacity. This could include funding positions that are embedded within local public health facilities or CBOs, or supporting social enterprises that can provide stable, long-term employment for care professionals, ensuring that skills and services are sustained beyond the life of a single project.

The following table provides a summary of the key skills gaps and corresponding recommendations for training interventions.

Table 3: Skills Gap Analysis and Training Recommendations

Identified Skill Gap Area	Evidence of Gap	Target Workforce Cadres	Recommended Training Intervention	Potential Lead Institutions
Allied Health Professionals   MoH acknowledgement of critical shortages and skill mix imbalance. <sup>82</sup>   Pharmacists, Medical Laboratory Technologists   Increase university intake quotas; strengthen existing BSc programs.   Universities with Health Science Colleges, Ministry of Education				
Geriatric & Palliative Care   Rising NCD burden and aging population vs. lack of formal training programs; services are ad-hoc or volunteer-led. <sup>75</sup>   Geriatric Nurses, Hospice Program Coordinators, Palliative Care Aides   Develop new accredited BSc/Diploma programs in Geriatric Nursing and Palliative Care; create mandatory CPD modules for existing nurses/doctors.   Universities (e.g., AAU, Gondar), Ethiopian Nurses Association (ENA), TVET Colleges				
Health Informatics & Digital Health   National Digital Health Blueprint creates demand for new technical skills; job ads show need for HIS/DHIS2 experts. <sup>63</sup>   Health Information Officers, Health Informatics Analysts, eHealth Specialists, Data Engineers   Develop new BSc/MSc programs in Health Informatics; offer specialized certificate courses in DHIS2, EMR management, and health data analytics.   Universities (IT & Public Health Depts.), Tech Institutes, MoH				
Mid-Level MHPSS Providers   Strain on PHC system from mhGAP task-sharing; need for supervision and specialized community support. <sup>12</sup>   Psychiatric Nurses, Clinical Psychologists (MSc), Counselors, MHPSS Supervisors   Scale up MSc programs in Clinical/Counseling Psychology; develop a new diploma/advanced diploma for Psychiatric Nursing; create a formal certification for MHPSS Supervision.   Universities (Psychology Depts.), Ethiopian Psychological Association (EPA), MoH				



| Professional Caregiving | Growing urban demand for private elderly/child care; emergence of private training centers indicates market need for formal skills.<sup>72</sup> | Professional Caregivers, Nannies, Home Health Aides | Develop accredited 6-12 month vocational certificate programs in "Professional Caregiving" with specializations (elderly, child, post-op). | TVET Colleges, Private Vocational Schools, NGOs |

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# **Ethiopia's Orange Economy: An Inventory of Employment Opportunities and a Blueprint for Growth**

## **Executive Summary: Ethiopia's Orange Economy at a Crossroads - Tapping Creative Potential for National Development**

Ethiopia's creative, cultural, and leisure industries—collectively known as the Orange Economy—stand at a critical juncture. Possessing a rich cultural heritage, a vibrant youth population, and a burgeoning digital scene, the sector holds immense, yet largely untapped, potential to address the nation's pressing employment challenges and drive economic diversification. This report provides a systematic, nationwide examination of employment opportunities across this dynamic sector, documenting a wide spectrum of work from formal salaried positions and freelance roles to informal gig work and traditional artisanship.

The central finding of this analysis is that Ethiopia's Orange Economy is a vibrant but fragmented ecosystem. It is characterized by a significant gap between ambitious national policies and the practical realities of the market. A stark geographic disparity exists, with modern, high-skill creative roles heavily concentrated in the capital, Addis Ababa, while regional employment remains largely rooted in cultural heritage, tourism, and informal craft production. Concurrently, a globally-oriented freelance workforce is emerging, leveraging digital platforms to bypass local constraints and access international markets, signaling both a major opportunity and a drain on the domestic talent pool.

Key systemic constraints impede the sector's growth, forming an interlocking barrier of limited access to finance, weak intellectual property (IP) enforcement, and an uneven digital infrastructure. The educational pipeline, while producing talented individuals, is misaligned with market demands, creating a "triple-track" system of

formal, vocational, and self-taught pathways that are poorly integrated. This results in critical skills gaps, particularly in the "creative management" and entrepreneurial competencies needed to commercialize artistic talent.

This report concludes with a series of strategic recommendations aimed at unlocking the sector's potential. These include targeted investments in demand-driven skills development, strengthening the creative ecosystem through modernized financial instruments and robust IP protection, and actively fostering linkages between traditional and digital creative industries. If these systemic challenges are addressed through coordinated action by government, educational institutions, and the private sector, Ethiopia's Orange Economy can transition from a collection of disparate activities into a powerful, cohesive engine for national development, sustainable job creation, and cultural expression in the 21st century.

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## **Part I: The National Imperative for a Creative Economy**

This section establishes the macroeconomic and policy context, arguing why the Orange Economy is not a niche sector but a critical engine for Ethiopia's future development, particularly in addressing its youth employment challenge.

### **1.1 The Demographic Dividend and the Employment Challenge**

Ethiopia is at a demographic crossroads. As the second most populous nation in Africa with approximately 126.5 million people in 2023, its greatest asset is its youth.<sup>1</sup> However, this asset presents a formidable challenge: an estimated 2 million young people enter the labor market each year, placing immense pressure on the economy's absorption capacity.<sup>1</sup> The formal economy, despite rapid growth in previous years, has struggled to create sufficient quality jobs, a situation exacerbated by multiple crises that have increased poverty and constrained public spending.<sup>1</sup> This has resulted in high youth unemployment and a large, dominant informal sector where jobs are often precarious and offer limited opportunities for advancement.<sup>3</sup>

It is within this context that the creative industries emerge as a strategic solution.

Globally, the creative economy is recognized as a significant employer, contributing 6.2% to the global workforce and being particularly important for youth and women.<sup>4</sup> These industries are often characterized by lower barriers to entry, a greater reliance on talent and ideas than on physical capital, and a natural alignment with the aspirations of a younger, digitally-native generation.<sup>4</sup> This potential has been recognized by Ethiopian policymakers and their international partners. Government initiatives such as the World Bank-funded "Bikat Youth on-the-Job Training" program, which aims to provide on-the-job training to thousands of young people, and the establishment of a dedicated Job Creation Commission, signal a high-level focus on tackling the youth employment crisis.<sup>2</sup> The Orange Economy offers a scalable and relevant pathway to help meet these ambitious job creation targets, transforming a demographic challenge into an economic dividend.

## **1.2 Policy & Ambition: The National and International Framework**

Ethiopia's engagement with its creative sector is supported by a foundation of national policies and growing international partnerships. Foundational documents like the National Cultural Policy, ratified in 2015, and its predecessors emphasize the protection and promotion of the country's diverse cultural heritage, languages, and artistic expressions.<sup>8</sup> More recently, the government's ambitions have expanded to embrace the digital future. The "Digital Ethiopia 2025" strategy is a key enabler, aiming to digitize the economy by creating essential infrastructure, including digital payment systems, e-governance portals, and improved connectivity, which form the backbone of the modern creative sector.<sup>11</sup> Furthermore, a planned revision of the 13-year-old national tourism policy indicates a strategic shift towards enhancing global competitiveness and integrating digital innovation.<sup>15</sup>

This national ambition is amplified by active participation in the global creative economy discourse. Ethiopia has hosted workshops with the United Nations Conference on Trade and Development (UNCTAD) to build institutional capacity and harness the sector for sustainable development.<sup>4</sup> It is also a beneficiary of UNESCO's International Fund for Cultural Diversity (IFCD), which in 2025 approved funding for a project to strengthen the children's literature ecosystem in the country.<sup>18</sup> These partnerships provide crucial funding, technical expertise, and a global perspective.

However, a significant chasm exists between these well-articulated policies and the on-the-ground reality. Reports consistently highlight that despite the policy frameworks, the creative scene remains heavily concentrated in Addis Ababa, with creative workers, especially youth, often lacking formal skills, resources, and institutional support to grow their enterprises.<sup>4</sup> This policy-practice gap reveals a critical disconnect: while national policies speak eloquently of cultural preservation, they have not yet fully evolved to address the specific commercial, industrial, and technological needs of a modern, job-creating Orange Economy. This report will consistently explore this gap, analyzing how the language of policy can be better aligned with the practical needs of the market.

### **1.3 Economic Contribution & Untapped Potential**

The global creative economy serves as a powerful benchmark for Ethiopia's potential. It is a formidable economic force, contributing an estimated 3.1% to global Gross Domestic Product (GDP) and generating over \$2.25 trillion annually, with projections for continued robust growth.<sup>4</sup> Developing economies, in particular, are seeing a rise in creative industries, driven by demographic shifts and the increasing consumption of digital creative content.<sup>4</sup>

While comprehensive, up-to-date figures for the sector's contribution to Ethiopia's GDP remain a critical data gap, existing research confirms its economic significance. A study conducted for the World Intellectual Property Organisation (WIPO) highlighted the value-added, employment creation, and export earnings generated by Ethiopia's copyright-based industries, concluding that with appropriate policy support, this contribution could be significantly enhanced.<sup>19</sup> Specific sub-sectors show clear potential; the film and audio-visual industry, for example, is estimated to generate up to US\$70 million annually.<sup>17</sup> The handicraft sector, deeply rooted in the nation's cultural heritage, is a vital source of income, particularly for women and youth in rural and semi-urban areas who create products for both tourist and export markets.<sup>21</sup>

Therefore, the opportunity must be framed not merely as a cultural pursuit but as a strategic economic imperative. A thriving Orange Economy can drive economic diversification away from traditional sectors, boost foreign exchange earnings

through the export of both physical goods (crafts, textiles) and digital services (animation, design, software development), and enhance Ethiopia's global brand image. By leveraging its unique cultural assets and the creativity of its youth, Ethiopia can unlock a new frontier of sustainable and inclusive growth.<sup>19</sup>

## Part II: An Inventory of Opportunity: Mapping the Ethiopian Creative Workforce

This section provides a core, data-driven inventory of employment opportunities across Ethiopia's Orange Economy. It systematically documents the roles, skills, and market dynamics within key sub-sectors, offering a granular view of the current labor landscape. The findings are summarized in the comprehensive master table below.

**Table 2.1: Master Inventory of Orange Economy Positions in Ethiopia**

Job Title and Role Name	Sub-sector Category	Brief Description	Quantity of Similar Positions Identified	Typical Location	Employment/Contract Type	Key Data Sources
Graphic Designer	Visual Arts & Crafts; Creative Marketing; Design & User Experience	Creates visual concepts for print/digital media, including logos, brochures, social media graphics, and websites.	High (dozens of formal ads, many freelance)	Predominantly Addis Ababa	Full-time, Freelance, Contract	<sup>22</sup>
UI/UX Designer	Design and User Experience	Designs user interfaces	Medium (growing demand)	Addis Ababa	Full-time, Freelance	<sup>27</sup>

	e	and experiences for software, websites, and mobile apps, focusing on usability and accessibility.				
Content Creator / Content Writer	Media & Digital Content; Creative Marketing	Researches, writes, and edits engaging content (blogs, articles, social media posts, video scripts) for various platforms.	High	Addis Ababa	Full-time, Contract, Freelance	30
Social Media Manager	Creative Marketing and Communication	Develops and executes social media strategies, manages online communities, and analyzes performance metrics.	High	Addis Ababa	Full-time	34



Video Editor / VFX Artist	Media & Digital Content; Music & Audio Production	Assembles and edits raw footage, adds special effects, and creates finished video products for film, TV, or online media.	High	Addis Ababa	Full-time, Part-time, Freelance	37
Digital Marketer	Creative Marketing and Communication	Plans and executes digital marketing campaigns, including SEO/SEM, email, social media, and display advertising.	High	Addis Ababa	Full-time, Freelance	42
Documentary Producer	Media and Digital Content	Plans, directs, produces, and edits documentary films, often focusing on humanitarian or	Low (specialized)	Addis Ababa (for HQs), field work nationwide	Contract	45

		social issues.				
Tour Guide	Cultural Heritage and Tourism	Guides tourists through historical, cultural, or natural sites, providing information and ensuring a positive experience.	Medium	Nationwide (heritage sites), Addis Ababa (city tours)	Full-time, Freelance, Seasonal	46
Tour Operator	Cultural Heritage and Tourism	Designs, plans, and manages tour packages, coordinating logistics like transport, accommodation, and activities.	Medium	Addis Ababa	Full-time	48
Museum Staff (e.g., Supervisor, Administrator)	Cultural Heritage and Tourism	Manages daily operations of museums or cultural centers, including visitor services, exhibits,	Low (specialized)	Addis Ababa (e.g., Zoma Museum)	Full-time	49

		and administration.				
Heritage Project Manager	Cultural Heritage and Tourism	Designs and implements cultural heritage conservation projects, including fundraising and stakeholder coordination.	Low (specialized)	Addis Ababa	Contract	50
Artisan / Craftsperson (Weaver, Potter, Jeweler)	Visual Arts and Crafts; Fashion & Textile Design	Creates handmade goods using traditional techniques. Includes weavers, potters, jewelers, leatherworkers, etc.	Very High (mostly informal)	Nationwide, with regional specializations	Informal, Self-employed, Cooperative member	21
Fashion Designer	Fashion and Textile Design	Designs clothing, accessories, and textiles, from concept to production.	Medium (largely informal/entrepreneurial)	Addis Ababa (for high fashion), regional (traditional)	Self-employed, Small Business Owner	29

Musician / Performer (Vocalist, Instrumentalist)	Performing Arts; Music & Audio Production	Performs music live or for recordings. Includes traditional Azmaris and contemporary artists.	High (mostly informal/gig-based)	Nationwide, concentrated in Addis Ababa for commercial work	Gig work, Freelance, Salaried (in cultural troupes)	57
Actor / Theatre Performer	Performing Arts	Performs in theatre productions, films, or television shows.	Medium (project-based)	Addis Ababa	Project-based contract	60
Circus Artist	Performing Arts	Performs acrobatic, juggling, and other circus skills in troupes.	Medium	Nationwide (53 groups across regions)	Member of a troupe/association	62
Music Producer / Audio Engineer	Music and Audio Production	Oversees the recording, mixing, and mastering process of music or audio projects.	Medium (growing freelance market)	Addis Ababa, Remote (freelance)	Freelance, Project-based, Salaried (in studios)	59
Translator (Amharic-English)	Publishing and Literature	Translates written content, documents, or	Medium (freelance)	Remote, Addis Ababa	Freelance	66

		literary works between languages .				
Photographer / Videographer	Media and Digital Content	Captures and edits photos and videos for events, commercial projects, or artistic purposes.	High	Addis Ababa, Nationwide (for events)	Freelance, Full-time	38
Arts Instructor / Workshop Facilitator	Creative Education and Training	Teaches artistic or creative skills in formal institutions, private classes, or workshops.	Medium	Addis Ababa, Regional Universities	Full-time, Part-time, Freelance	68

## 2.1 The Digital & Media Powerhouse: Addis Ababa's Creative Core

The nerve center of Ethiopia's modern creative economy is unequivocally Addis Ababa. An analysis of formal job portals such as EthioJobs, HahuJobs, and GeezJobs reveals that the vast majority of salaried creative positions are located in the capital.<sup>36</sup> This concentration is so pronounced that the British Council's 2022 mapping study of the creative ecosystem quoted a practitioner lamenting, "It's as if everything is packed in Addis Ababa".<sup>74</sup>

The roles advertised reflect a mature and diverse digital media landscape. High

demand exists for **Graphic Designers, UI/UX Designers, Digital Marketers, Social Media Managers, Content Creators, and Video Editors.**<sup>22</sup> Employers are not limited to traditional creative agencies like Cactus Ethiopia or Prologue BCW.<sup>75</sup> A significant number of technology firms (e.g., Kifiya Financial Technologies, Digital Equb), manufacturing companies (e.g., Dodai Manufacturing), and import-export businesses (e.g., Sinopia) are hiring in-house creative talent to manage their branding, marketing, and digital presence.<sup>27</sup> This indicates a mainstreaming of creative skills as essential business functions across the broader economy. The skills required are specific and globally standardized, with job descriptions frequently demanding proficiency in Adobe Creative Suite, design platforms like Figma, SEO principles, and content management systems.<sup>22</sup>

## 2.2 Guardians of Heritage: Cultural & Tourism Roles Across the Regions

Beyond the digital hub of the capital, a distinct set of opportunities exists in the Cultural Heritage and Tourism sub-sector, which are geographically dispersed across Ethiopia's historically and naturally rich regions. Key roles include **Tour Guides** and **Tour Operators**, who are the primary interface between Ethiopia's cultural assets and international visitors.<sup>46</sup> While the administrative and planning functions of tour companies are based in Addis Ababa, the guide positions are inherently tied to destinations like Lalibela, Axum, Gondar, and the national parks.

Qualifications for these roles emphasize deep cultural and historical knowledge, alongside critical soft skills. Job postings for tour guides and operators often require fluency in multiple languages—English is a baseline, with a high premium on other international languages like French, German, or Chinese, as well as major local languages such as Amharic, Afan Oromo, and Tigrinya.<sup>46</sup> Furthermore, formal certification and licensing are often mandatory, as seen in the requirement for a specific professional driving license for Tour Guide Drivers at Ethiopian Airlines.<sup>47</sup> Employment in museums and cultural centers, such as the Zoma Museum in Addis Ababa, offers more specialized roles like supervisors and administrators.<sup>49</sup> At a higher level, project-based roles like

**Heritage Project Manager** for organizations like the Ethiopian Heritage Trust require specialized experience in conservation, fundraising, and coordination with

government authorities.<sup>50</sup>

### 2.3 The Artisan & Craft Economy: From Traditional Workshops to Global Marketplaces

The artisan economy represents the largest, yet most informal, segment of Ethiopia's creative workforce. Spanning the sub-sectors of Visual Arts & Crafts and Fashion & Textile Design, it encompasses a vast number of **Artisans** and **Craftspeople** engaged in pottery, jewelry making, traditional weaving, and leatherwork.<sup>21</sup> This sector is a critical source of income, especially for women and youth in rural and semi-urban areas.<sup>21</sup> Formal job postings are scarce, reflecting the sector's informal structure.

Evidence of employment comes from analyzing the structure of the industry itself. On one end are large, formal employers like the Bahir Dar Textile Share Company and other garment factories, which provide industrialized jobs.<sup>77</sup> On the other end are social enterprises and producers like Sabahar and Welana, which work directly with artisan communities, particularly weavers, to produce high-quality, handmade textiles for export, often under fair-trade principles.<sup>53</sup>

A significant and growing channel for this sector is the direct-to-consumer global market. A multitude of Ethiopian artisans and small entrepreneurs leverage online marketplaces like Etsy and eBay to sell traditional clothing (*Habesha Kemis*), jewelry, and other crafts to a global diaspora and international consumers.<sup>52</sup> This trend highlights a pathway to formalization and increased income, bypassing many local market intermediaries.

### 2.4 The Performing Arts Ecosystem: Stage, Sound, and Spectacle

Employment in the performing arts and music production is characterized by a mix of institutional roles and a dominant gig-based, informal economy. Formal employers include cornerstone cultural institutions like the **Ethiopian National Theatre**, which employs actors, directors, and production staff for its stage productions.<sup>60</sup> Cultural centers are vital nodes of employment;



**Fendika Cultural Center** in Addis Ababa, for instance, is a crucial supporter of traditional musicians (*Azmaris*) and dancers, providing them with regular performance opportunities and salaries.<sup>57</sup>

Associations also play a key organizing role. The **Ethiopian National Circus Association (ENCAC)** is a consortium representing 53 circus groups across multiple regions, creating a structure for employment, training, and facilitating international contracts for its thousands of members.<sup>62</sup>

Beyond these structures, much of the work for musicians, actors, and dancers is project-based or freelance. A burgeoning area is in music and audio production. A significant number of Ethiopian **Music Producers, Beat Makers, and Audio Engineers** are now offering their services on a freelance basis through global platforms like SoundBetter and Upwork, working with both local and international artists remotely.<sup>59</sup>

## 2.5 The Gig & Freelance Frontier: Ethiopia's Independent Creative Workforce

A defining trend in Ethiopia's Orange Economy is the rapid growth of a globally-connected, independent creative workforce. This "gig economy" cuts across multiple sub-sectors, particularly Digital Creative Services, Media, and Publishing. Leveraging international freelance platforms like Upwork, Twine, and Workana, Ethiopian creatives are providing services directly to a global clientele.<sup>26</sup>

The roles offered are diverse and align with global digital demand. They include **Graphic Designers, Illustrators, Video Editors, Animators, Music Producers, Voiceover Artists, Content Writers, and Translators** (especially for Amharic-English).<sup>26</sup> This mode of work offers significant advantages, most notably compensation in foreign currency (USD), which is often substantially higher than local salaried positions. Hourly rates on platforms like Upwork can range from \$10 for entry-level tasks to over \$30 for specialized skills.<sup>65</sup> This digital-export model represents one of the highest-potential growth areas for the Ethiopian creative economy, allowing talent to transcend local economic limitations. However, it also risks creating a "brain drain" from the domestic market, as top talent is drawn to more lucrative international projects.

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## Part III: The Skills & Training Landscape: Forging the Next Generation of Creatives

This section critically assesses the human capital pipeline for Ethiopia's Orange Economy. It analyzes the pathways through which creatives acquire their skills—from formal university degrees to agile vocational courses and self-directed online learning—and evaluates their alignment with the concrete demands of the contemporary job market identified in Part II. The analysis reveals a fragmented system with significant gaps between the skills being supplied and those in highest demand.

**Table 3.1: In-Demand Skills Matrix for the Ethiopian Orange Economy**

Sub-sector	Technical/Domain Skills	Creative/Mindset Skills	Business/Soft Skills
Media & Digital Content	Adobe Premiere Pro, Final Cut Pro, After Effects, Photography, Videography, Drone Operation, CMS (e.g., WordPress), SEO Principles	Storytelling, Scriptwriting, Journalistic Ethics, Creativity, Visual Composition, Cultural Sensitivity	Amharic & English Fluency, Project Management, Communication, Adaptability, Meeting Deadlines
Creative Marketing & Communication	Social Media Platform Management (All major platforms), SEO/SEM, Google Analytics, Email Marketing Tools, Ad Campaign Management, Copywriting	Brand Strategy, Creative Thinking, Storytelling, Audience Analysis, Persuasive Writing	Client Management, Communication, Teamwork, Analytical Skills, Time Management, Amharic & English
Design & User	Adobe Creative Suite	Design Thinking, User	Collaboration with

<b>Experience (UI/UX)</b>	(Photoshop, Illustrator, InDesign), Figma, Sketch, Wireframing Tools, Prototyping, HTML/CSS (understanding of)	Empathy, Problem-Solving, Visual Hierarchy, Creativity, Attention to Detail	Developers/PMs, Communication, Receiving Feedback, Time Management
<b>Visual Arts &amp; Crafts</b>	Traditional Craft Techniques (Weaving, Pottery, Leatherwork, Metalwork), Painting, Sculpting, Drawing, Digital Illustration	Creativity, Originality, Aesthetic Sensibility, Cultural Authenticity, Attention to Detail	Entrepreneurship, Pricing, Marketing (especially for online sales), Customer Service
<b>Fashion &amp; Textile Design</b>	Pattern Making, Sewing, Textile Knowledge, Draping, Fashion Illustration, CAD for Fashion	Design Conceptualization, Trend Awareness, Creativity, Understanding of Form & Function	Business Management, Sourcing, Production Management, Marketing & Branding
<b>Music &amp; Audio Production</b>	DAWs (e.g., FL Studio, Ableton), Audio Mixing & Mastering, Sound Engineering, Music Theory, Instrument Proficiency, Recording Techniques	Musicality, Composition, Arrangement, Creativity, Critical Listening	Collaboration with Artists, Project Management, Client Communication, Negotiation (for freelancers)
<b>Cultural Heritage &amp; Tourism</b>	Historical & Cultural Knowledge, Tour Itinerary Planning, Safety Protocols, First Aid	Storytelling, Public Speaking, Cultural Sensitivity, Interpersonal Skills	Multilingualism (English, Amharic, Oromo, French, etc.), Customer Service, Problem-Solving, Crowd Management
<b>Publishing &amp; Literature</b>	Writing, Editing, Proofreading, Translation (Amharic-English), Publishing	Storytelling, Narrative Structure, Creativity, Critical Analysis, Language Nuance	Project Management, Author/Client Relations, Attention to Detail

	Software (e.g., InDesign)		
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### 3.1 Formal Education: The Foundation and Its Fractures

The apex of formal creative education in Ethiopia is Addis Ababa University (AAU). Its **Skunder Boghossian College of Performing and Visual Arts** is the nation's most prestigious and oldest institution of its kind, housing three distinct schools: the **Alle School of Fine Arts and Design**, the **Yared School of Music**, and the **Yoftahe Nigussie School of Theatrical Arts**.<sup>68</sup> For over five decades, these schools have been the primary producers of Ethiopia's formally trained painters, sculptors, musicians, and theatre professionals, offering both Bachelor's and Master's degrees.<sup>68</sup> Alongside this, the

**AAU School of Journalism and Communication** serves as a key training ground for media professionals.<sup>84</sup> In recent years, this model has expanded, with other public universities such as Bahir Dar, Jimma, and Gondar establishing their own programs in creative fields like fashion design and film production.<sup>86</sup>

Despite this foundational role, a critical disconnect exists between academic curricula and the rapidly evolving demands of the commercial creative market. While these institutions provide a strong theoretical and historical grounding, they are often perceived as slow to adapt to new technologies and business practices. A comparison of university course catalogs with the specific software proficiencies and commercial objectives listed in job advertisements for roles like "Graphic Designer" or "UI/UX Developer" reveals a significant gap.<sup>22</sup> There is a notable absence of dedicated, high-level degree programs in high-demand digital fields such as UI/UX design, digital marketing, or animation, forcing students and employers to look elsewhere to fill these skills gaps.

### 3.2 Vocational & Applied Skills: The Hands-On Approach

Occupying the space between theoretical university education and informal learning

is a vibrant ecosystem of vocational and applied skills training. Private institutions like **Arakele Fashion Design College** in Addis Ababa offer certificate and diploma-level programs that are intensely practical, focusing on skills like sewing and pattern making to prepare students for direct entry into the garment industry.<sup>69</sup> This hands-on approach is mirrored by private providers offering short, intensive courses in specific digital skills. For example, The Knowledge Academy provides a one-day "Music Production Masterclass" in Addis Ababa, targeting both aspiring and professional audio engineers and producers with training on mixing consoles, signal processors, and studio procedures.<sup>89</sup>

Non-governmental and civil society organizations are also indispensable players in this domain. **Selam Ethiopia**, for instance, has run projects to upgrade the skills of sound engineers and producers, while the **Ethiopian National Circus Association (ENCAC)** provides systematic training in circus arts to its 53 member groups across the country.<sup>62</sup> These initiatives are often more agile and accessible than formal education, frequently targeting marginalized youth and filling critical voids left by the public education system.

### 3.3 The Self-Taught Generation: Digital Natives and Online Learning

The third, and perhaps most dynamic, skills pathway is that of the self-taught digital creative. The proliferation of Ethiopian freelancers on global platforms like Upwork, SoundBetter, and Twine—offering sophisticated services in video editing, music production, and graphic design—points to a large and growing cohort of individuals who have acquired their skills outside of any formal institutional setting.<sup>26</sup> Their education comes from online courses, tutorials, and peer-to-peer knowledge sharing. This is further evidenced by a grassroots culture of DIY learning visible on platforms like YouTube, where Amharic-language channels dedicated to "የፈጠራ ስራዎች" (creative works/innovations) share technical knowledge and project ideas.<sup>91</sup>

This pathway is the most responsive and adaptable to the fast-changing global market. Creatives can learn the latest software or technique as soon as it becomes relevant, without waiting for a curriculum to be updated. However, this agility comes at a cost. These individuals often lack formal certification, which can be a significant barrier to accessing more stable, senior-level positions in the formal domestic

economy. This highlights an urgent need for national systems that can recognize and credential skills regardless of how they were acquired, such as a framework for Recognition of Prior Learning (RPL). The existence of these three parallel but poorly connected tracks—formal university, vocational training, and informal self-teaching—creates significant inefficiencies in the human capital pipeline, leading to skills mismatches and limiting the full economic potential of Ethiopia's creative talent.

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## Part IV: Systemic Enablers & Constraints

The growth of Ethiopia's Orange Economy is not solely dependent on the availability of talent and opportunities. It is fundamentally shaped by the underlying ecosystem—the "rules of the game" and the infrastructure that can either enable or constrain creative enterprise. This section analyzes three critical and interlocking factors: access to finance, the intellectual property regime, and the state of digital and market infrastructure. Addressing these systemic issues is paramount for transitioning the sector from a collection of fragmented activities into a sustainable economic engine.

**Table 4.1: Compensation Snapshot for Key Creative Roles in Ethiopia (ETB)**

Job Title	Full-Time (Monthly Salary Range - ETB)	Freelance (Estimated Monthly Earnings - ETB)*	Project-Based (Typical Fee Range - ETB)	Notes and Data Sources
Graphic Designer	15,000 - 40,000+	50,000 - 120,000+	5,000 - 50,000+ per project	Formal salaries from job portals are often unspecified or lower-end. Freelance estimates based on Upwork rates of \$10-25/hr. High variability. <small>22</small>
UI/UX Designer	25,000 -	80,000 -	N/A (Typically	Higher formal

	60,000+	175,000+	salaried or long-term contract)	salaries reflect high demand. Freelance estimates based on Upwork rates of \$15-35/hr. <sup>27</sup>
<b>Content Writer / Social Media Manager</b>	12,000 - 35,000	40,000 - 100,000+	2,000 - 20,000 per project/month	Freelance writing/editing on Upwork ranges from \$10-30+/hr depending on technicality. <sup>30</sup>
<b>Video Editor</b>	18,000 - 45,000	60,000 - 140,000+	10,000 - 100,000+ per project	Freelance rates on Upwork show a wide range, with some specialists charging \$33/hr. <sup>39</sup>
<b>Music Producer</b>	N/A (Rarely a full-time salaried role)	45,000 - 150,000+	15,000 - 200,000+ per track/EP	Almost entirely freelance/project-based. Estimates based on Upwork/SoundBetter rates from \$10-35+/hr. <sup>59</sup>
<b>Tour Guide</b>	10,000 - 25,000 (base) + tips/commission	N/A	Per-day or per-tour fees	Formal salaries can be low; income is heavily supplemented by tips and commissions. <sup>46</sup>
<b>Artisan / Craftsperson</b>	N/A (Informal)	Highly Variable	Per-piece sales	Income is based on direct sales via markets or



				online platforms like Etsy. Highly variable and difficult to estimate. <sup>21</sup>
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*\*Note on Freelance Estimates: Freelance monthly earnings are estimated based on typical hourly rates found on international platforms (e.g., Upwork) and are converted to ETB at an approximate rate of 1 USD = 58 ETB. They assume a full-time equivalent of 160 billable hours per month. These figures are illustrative and can vary significantly based on skill, experience, and client. The large discrepancy between local salaries and potential freelance earnings is a key finding.*

### 4.1 Financing Creativity: The Access to Capital Hurdle

A primary constraint stifling the growth of Ethiopia's creative enterprises is the severe lack of access to appropriate finance. The country's banking sector operates on conventional models that heavily rely on tangible collateral, such as land or buildings, to secure loans.<sup>19</sup> This model is fundamentally misaligned with the nature of creative businesses, whose most valuable assets are intangible—intellectual property, brand value, and human talent. As a result, most creative entrepreneurs, particularly youth and those in small and medium-sized enterprises (SMEs), are effectively marginalized from the formal credit system, hindering their ability to invest in equipment, marketing, or scale their operations.<sup>19</sup>

While the emergence of digital lending platforms like Michu, which offers uncollateralized loans, represents a positive development, access to capital remains a significant and widespread challenge.<sup>14</sup> To overcome this hurdle, a strategic shift in financial policy is required. Development literature and international experience point to several effective interventions that could be adapted for Ethiopia. These include the establishment of government-backed grant programs for creative startups, the creation of specialized venture capital funds focused on creative tech, the promotion of crowdfunding platforms to mobilize community investment, and the introduction of tax incentives for investment in creative industries, a policy that proved highly successful in boosting Colombia's film sector.<sup>6</sup>

## 4.2 Protecting Creativity: The Intellectual Property Regime

Ethiopia possesses a formal intellectual property framework, managed by the **Ethiopian Intellectual Property Authority (EIPA)**. This includes proclamations that govern copyright, patents, and trademarks, with copyright protection lasting for the life of the author plus 50 years.<sup>93</sup> However, the existence of these laws has not translated into effective protection on the ground. The central challenges are weak enforcement and a pervasive lack of awareness among both creators and consumers. Digital piracy is described as "rampant and menacing," severely undermining the commercial viability of the music, film, and literary sectors by decimating potential revenue streams and discouraging future investment.<sup>95</sup>

Recognizing this critical failure, efforts are underway to strengthen the system. The EIPA is actively working to digitize registration processes, improve stakeholder collaboration, and implement a more coordinated legal framework for enforcement.<sup>93</sup> A pivotal step in this process is the establishment and operationalization of a

**Collective Management Organization (CMO)**, such as the Copyright & Neighboring Rights Collective Management (CNCM) society.<sup>97</sup> An effective CMO is essential for licensing creative works, collecting royalties from users (like broadcasters and businesses), and distributing that income to artists—a function that is fundamental to monetizing creativity at scale.<sup>96</sup> Complementing these government efforts are NGO-led initiatives like Selam Ethiopia's EIPRE project, which focuses on building capacity and providing practical tools for artists to understand and defend their rights.<sup>98</sup>

## 4.3 Connecting Creativity: Digital Infrastructure and Market Access

The digital transformation of Ethiopia's economy is a cornerstone for the future of its creative industries. The government's "**Digital Ethiopia 2025**" strategy is the primary vehicle for this change, with stated priorities including the expansion of 4G and 5G network coverage, the launch of a national digital ID system, and the development of e-governance and e-trade portals.<sup>11</sup> The landmark liberalization of the telecommunications sector and the entry of Safaricom as a competitor to the state-

owned Ethio-telecom are expected to accelerate improvements in service quality and affordability.<sup>12</sup>

Despite this progress, a significant urban-rural digital divide persists. Reliable, high-speed internet access remains largely an urban phenomenon, reinforcing the heavy concentration of the digital creative economy in Addis Ababa.<sup>4</sup> This digital gap limits the ability of creatives in regional and rural areas to access online training, collaborate with peers, and, most importantly, tap into national and global digital markets.

The platforms for market access are diverse but reflect this geographic and digital divide.

183. **Formal Employment:** Local job portals like EthioJobs, HahuJobs, and GeezJobs are the primary channels for formal, salaried creative positions, almost exclusively based in Addis Ababa.<sup>36</sup>
184. **Global Freelancing:** International marketplaces like Upwork, Twine, and SoundBetter provide a crucial gateway for digitally-skilled Ethiopians to connect directly with international clients, offering a powerful way to bypass local market constraints.<sup>39</sup>
185. **E-commerce for Crafts:** Platforms such as Etsy, eBay, and specialized online stores like Modern Habesha enable artisans to sell physical goods directly to a global consumer base.<sup>52</sup>
186. **Informal Networks:** For local gigs and services, informal channels on social media platforms like Facebook and Telegram remain a vital, albeit unmeasured, part of the ecosystem.

The combination of these systemic factors—limited finance, weak IP protection, and uneven infrastructure—creates a powerful cycle that suppresses the domestic creative market. An aspiring creative in a regional town faces a tripartite barrier: poor internet limits their access to knowledge and markets; a lack of collateral blocks them from securing a loan; and the threat of piracy devalues their final product. This environment incentivizes the most talented and digitally-savvy individuals to bypass the local ecosystem entirely in favor of international freelance work, further starving the domestic market of the high-level skills needed for its own development. Therefore, policy interventions must be holistic, addressing these interlocking constraints simultaneously to create a truly enabling environment for all of Ethiopia's creatives.

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## Part V: Strategic Outlook & Actionable Recommendations

This concluding section synthesizes the report's findings into a forward-looking, actionable strategy for key stakeholders. It moves from analysis to prescription, identifying high-potential growth areas and proposing concrete interventions in workforce development, policy, and investment to unlock the full potential of Ethiopia's Orange Economy.

### 5.1 Identifying High-Growth Niches & Future-Proof Roles

By synthesizing global creative industry trends with Ethiopia's local digital adoption trajectory, several high-growth niches emerge as prime areas for development and investment. These roles leverage Ethiopia's unique assets while aligning with future market demands.

187. **Digital Content for Export:** Building on the existing success of freelancers, there is a significant opportunity to scale up the export of digital services. This includes specialized areas like 2D/3D animation, ghostwriting for international clients, and technical video editing for global content platforms.
188. **Podcast Production (Amharic & English):** As a low-cost, high-engagement medium, podcasting presents a major opportunity. There is a growing market for locally relevant content in Amharic and other Ethiopian languages, as well as a large, untapped diaspora audience hungry for content in English and their native tongues.
189. **Gamification and Interactive Leisure Software:** Identified as a nascent but globally booming industry in the British Council's mapping study, this area represents a forward-looking opportunity.<sup>74</sup> Developing local capacity in game design and interactive software could position Ethiopia as a future player in this lucrative market.
190. **Cultural Heritage Technology:** This niche involves merging Ethiopia's rich heritage with modern technology. Opportunities include creating virtual museum tours, developing augmented reality (AR) experiences for historical sites like

Lalibela, digitizing vast national archives, and creating immersive digital storytelling platforms about Ethiopian history and culture.

## 5.2 A Blueprint for Workforce Development

Addressing the skills gaps identified in Part III is the most critical step toward building a competitive creative workforce. A coordinated effort is needed across the entire educational landscape.

### 191. **Recommendations for Universities (e.g., Addis Ababa University):**

1. **Curriculum Modernization:** Integrate industry-standard software training (e.g., Adobe Creative Suite, Figma) and business management modules (project management, marketing, IP law) directly into all creative arts degree programs.
2. **Establish Formal Internships:** Create structured, for-credit internship programs in partnership with leading creative agencies, media houses, and cultural institutions to bridge the gap between theory and practice.

### 192. **Recommendations for TVET & Private Colleges:**

1. **Develop Agile, Certified Courses:** Launch short, intensive, and certified courses focused on high-demand digital skills, such as "Digital Marketing for Creatives," "UI/UX Fundamentals," and "Social Media Content Strategy."
2. **Focus on "Creative Entrepreneurship":** Offer programs that combine a technical craft with the skills needed to run a small business, targeting aspiring freelancers and artisans.

### 193. **Recommendations for Government (Ministry of Education, Jobs Creation Commission):**

1. **Implement a Recognition of Prior Learning (RPL) Framework:** Develop and launch a national system to formally assess and certify the skills of self-taught digital creatives, allowing them to access formal employment opportunities.
2. **Scale Up Successful NGO Models:** Identify and provide funding to scale up effective, non-formal training programs run by civil society organizations that have a proven track record of reaching and empowering marginalized youth.

### 5.3 Policy Levers for an Inclusive Orange Economy

Targeted, actionable policy adjustments are necessary to dismantle the systemic barriers constraining the sector.

194. **Recommendation for Ministry of Finance & National Bank of Ethiopia:**
  1. **Pilot Creative Sector Financing:** In partnership with development banks, design and pilot new financial instruments tailored for creative businesses. This could include a government-backed guarantee fund to de-risk loans, or seed funding for a venture capital fund focused on creative technology startups, drawing inspiration from successful international models.<sup>6</sup>
195. **Recommendation for the Ethiopian Intellectual Property Authority (EIPA):**
  1. **Operationalize the CMO:** Aggressively pursue the full operationalization of the Collective Management Organization (CMO) to ensure the collection and distribution of royalties for music, film, and literary works. This is a non-negotiable step for creating a functioning market.<sup>97</sup>
  2. **Launch Anti-Piracy Campaign:** Initiate a high-profile, nationwide public awareness campaign focused on the economic damage caused by digital piracy, framing it not as a victimless act but as a direct threat to the livelihoods of Ethiopian artists.
196. **Recommendation for Ministry of Culture and Sport & Ministry of Tourism:**
  - **Update the National Cultural Policy:** Formally revise the policy to explicitly recognize the "creative and cultural industries" as a strategic economic pillar, shifting the focus from solely preservation to include industrial development.
  - **Foster Regional Hubs:** Create a dedicated fund to support the establishment of creative hubs, co-working spaces, and artisan clusters in regional capitals outside of Addis Ababa. This would help decentralize the creative economy and foster more inclusive growth.

### 5.4 Investment & Partnership Opportunities

This analysis points to several clear, high-impact opportunities for private investors and development partners to catalyze growth in the sector.

- **Investment in Creative Hubs and Co-working Spaces:** There is a critical need

for physical infrastructure that provides affordable access to co-working spaces, high-speed internet, specialized equipment (e.g., recording studios, 3D printers, editing suites), and a community for collaboration and mentorship.<sup>99</sup>

- **Venture Capital for Creative Technology:** A dedicated investment fund focused on Ethiopian startups in high-growth niches like educational technology (EdTech), cultural tourism tech, digital media platforms, and gaming would stimulate innovation and attract top talent.
- **Public-Private Partnerships in Training:** Corporations can partner with universities and TVET colleges to co-design curricula, sponsor training programs, and offer apprenticeships. This creates a direct, reliable talent pipeline that meets specific industry needs.
- **Supporting the "Missing Middle":** A significant gap exists between individual freelancers and large-scale companies. There is a prime opportunity to fund accelerator and incubator programs that help successful freelancers, artisans, and small creative studios formalize their businesses, hire staff, and scale their operations into sustainable SMEs, thereby building the backbone of a robust domestic creative industry.

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# Ethiopia's Platinum Economy: A Systematic Analysis of the High-Value, Innovation-Driven Workforce and Ecosystem (2023-2025)

## Part I: Strategic Overview of Ethiopia's Platinum Economy

This section analyzes the high-level policy, investment, and institutional frameworks that are shaping the development of Ethiopia's knowledge-based economy. It examines the national strategies, legal reforms, and key ecosystem actors that collectively form the foundation upon which the Platinum Economy is being constructed.

### Section 1: The National Ambition and Policy Landscape

The emergence of Ethiopia's Platinum Economy is not an organic, market-led phenomenon alone; it is being actively cultivated through a deliberate, top-down strategic vision implemented by the national government. A close examination of recent policy initiatives reveals a highly coordinated, state-led strategy for economic transformation. The *Digital Ethiopia 2025* strategy serves as the foundational pillar upon which subsequent legislation is built. The introduction of the *Startup Proclamation* and the modernization of the *Intellectual Property Regime* are not coincidental but are interdependent components of a larger national vision to cultivate a knowledge-based economy. This cohesive, multi-pronged approach demonstrates a clear understanding that a digital economy requires more than just infrastructure; it necessitates a vibrant startup scene, a pipeline of skilled talent, and a secure environment for innovation.



## **1.1 The Digital Ethiopia 2025 Strategy: The Foundational Blueprint**

The cornerstone of Ethiopia's push towards a knowledge-intensive economy is the *Digital Ethiopia 2025 Strategy*, launched in June 2020.<sup>1</sup> This national blueprint aims to lay the groundwork for a robust digital economy by the end of 2025, with a comprehensive focus on developing digital infrastructure, integrating technology across all sectors, and ensuring access to digital services for all citizens.<sup>1</sup>

The strategy's impact is already quantifiable. The number of internet users in the country has surged from 17 million in early 2020 to over 44 million by early 2025, a clear indicator of expanding digital access.<sup>1</sup> This growth in connectivity has catalyzed a fundamental shift in the financial sector, where digital transactions now surpass cash transactions in volume.<sup>1</sup> The mobile sector's contribution to the national Gross Domestic Product (GDP) reached ETB 700 billion by 2023, underscoring the strategy's economic significance.<sup>3</sup>

To guide this transformation, the government established the Digital Transformation Council, a high-level body led by the Deputy Prime Minister, tasked with monitoring, evaluating, and overseeing the national digitalization process.<sup>1</sup> The existence of this council signals significant political will and a commitment to ensuring the strategy's objectives are met in a secure, integrated, and efficient manner. As the initial five-year plan nears its conclusion, the government is already developing successor strategies, including a Digital Government Strategy and an Electronic Commerce Strategy, indicating a continuous and evolving policy focus on deepening the digital transformation.<sup>1</sup>

## **1.2 The Startup Proclamation (2024/2025): Formalizing the Ecosystem**

Recognizing that a thriving digital economy requires a dynamic entrepreneurial class, the Ethiopian Council of Ministers endorsed the long-awaited Startup Proclamation in June 2025.<sup>4</sup> This legislation represents a landmark policy shift, designed to formalize and stimulate the country's tech startup ecosystem, which has historically relied on informal investor networks and donor support due to a lack of clear legal protections.<sup>4</sup>

The proclamation introduces a suite of targeted incentives for qualifying tech-driven businesses:

197. A five-year exemption from corporate tax.
198. Reduced withholding tax on angel investments to encourage early-stage capital injection.
199. Duty-free importation of capital goods for a period of three years.<sup>4</sup>

To ensure a direct market for innovation, the law mandates that universities allocate 2% of their research budgets to partnerships with certified startups. Furthermore, state-owned enterprises are required to pilot projects with at least one startup annually and set aside 5% of their Information and Communication Technology (ICT) procurement budget for them.<sup>4</sup> This creates a structured, government-backed customer base for nascent technology firms.

The legislation also addresses critical ecosystem infrastructure needs. It mandates the creation of the Ethiopian Startup Fund, capitalized with two billion birr (approximately \$36 million), to provide essential seed capital and low-interest loans.<sup>4</sup> For startups in highly regulated sectors like finance and telecommunications, the proclamation establishes a framework for regulatory sandboxes, allowing them to test innovative products and services under relaxed oversight.<sup>4</sup>

However, the implementation of this forward-looking policy faces a significant challenge rooted in macroeconomic shifts. The eligibility criteria for startups—being less than three years old and generating under five million birr in annual revenue—were established when the exchange rate was approximately 57 birr to the US dollar. Following an IMF-backed currency reform, the birr now trades at around 130 to the dollar.<sup>4</sup> This devaluation has effectively shrunk the revenue eligibility cap from approximately \$87,000 to just \$38,000. This discrepancy risks excluding many promising startups, particularly those reliant on foreign cloud services, software licenses, or imported hardware, from the very benefits designed to support them. This "policy-reality gap" represents a critical area for review to ensure the proclamation achieves its intended impact.

### **1.3 Science, Technology, and Innovation (STI) Policy Framework**

Complementing the economic and legal frameworks is the Science, Technology, and Innovation (STI) Policy Implementation Strategy, approved by the Council of Ministers in 2022.<sup>2</sup> This strategy is Ethiopia's response to its relatively low standing in global innovation indices—ranking 130th in 2024—and aims to drive sustainable growth by focusing on human capital development, research, and fostering local innovation.<sup>2</sup>

A central pillar of the STI policy is the strategic alignment of the education system with the needs of a technology-driven economy. The Professional and Program Mix Policy mandates a 70:30 allocation in undergraduate university programs, heavily favoring science and technology disciplines over humanities and social sciences.<sup>5</sup> This policy is designed to create a large, technically proficient talent pipeline. This directive is being actively implemented by institutions like the Addis Ababa Science and Technology University (AASTU), which has explicitly defined its mission as being a "University for Industry".<sup>6</sup> AASTU has formalized this through its University-Industry Linkage and Technology Transfer (UIL&TT) directorate, which establishes partnerships with industrial entities such as the Leather Industry Development Institute (LIDI) and the National Alcohol & Liquor Factory (NALF) to ensure its research and training are demand-driven.<sup>6</sup>

#### **1.4 Intellectual Property (IP) Regime Modernization**

A secure environment for innovation is a prerequisite for attracting investment and encouraging creativity. The Ethiopian Intellectual Property Authority (EIPA) is spearheading efforts to modernize the country's IP regime. This includes digitizing the registration processes, learning from international best practices, and enhancing enforcement mechanisms to protect creative and innovative works from infringement.<sup>7</sup>

A pivotal development in this area is Ethiopia's move in October 2024 to accede to the Paris Convention for the Protection of Industrial Property and the Madrid Protocol for the International Registration of Marks.<sup>8</sup> This is not merely a legal formality but a profound strategic signal to the global community. Accession to these international treaties is a critical step toward aligning Ethiopia's IP framework with global standards, which is essential for its ambitions to join the World Trade Organization (WTO) and attract greater foreign direct investment.<sup>8</sup> For international technology

companies and brands, a predictable and enforceable IP regime is a non-negotiable condition for market entry. By adopting these conventions, Ethiopia is actively de-risking its market for the foreign capital and expertise it seeks to attract, thereby directly supporting the legal and investment sub-sectors of the Platinum Economy.

## Section 2: The Innovation Ecosystem Architecture

The policies and strategies outlined above provide the blueprint, but the Platinum Economy is built and sustained by a complex network of organizations. This section maps the key players in Ethiopia's innovation ecosystem—the hubs, accelerators, investors, and research institutions—and analyzes the functions they perform and the relationships between them. The landscape reveals an ecosystem that is maturing from a focus on community-building to a more sophisticated, capital-driven model, yet one that still relies on a symbiotic relationship between development partners and private investors.

### 2.1 Innovation Hubs and Co-working Spaces: The Collaboration Layer

At the base of the ecosystem are the innovation hubs and co-working spaces that provide the physical and social infrastructure for collaboration. These hubs serve as the initial entry point for many aspiring entrepreneurs, offering more than just a desk and internet access.

The pioneering organization in this space is **iceaddis**, established in 2011 as Ethiopia's first innovation hub and tech startup incubator.<sup>9</sup> It has been a central node in the ecosystem, fostering a culture of innovation, collaboration, and entrepreneurship. Following its lead, other hubs have emerged, such as

**Orbit Innovation Hub (OIH)** in Addis Ababa, which provides a comprehensive support platform for digital startups. OIH offers incubatees access to co-working facilities, mentorship, legal advice, publicity, and seed funding, guiding them from the ideation stage to product launch.<sup>10</sup>

A significant sign of the ecosystem's geographic expansion is the establishment of hubs outside the capital. **icehawassa**, inaugurated in November 2022, serves as a shared workspace for entrepreneurs in Hawassa and has partnered with the city administration to promote local innovation through business incubation, training, and mentorship programs.<sup>11</sup> This decentralization is crucial for fostering broader national participation in the Platinum Economy and preventing an over-concentration of talent and opportunity in Addis Ababa.

## 2.2 Accelerators and Incubators: Nurturing High-Potential Ventures

Moving beyond basic incubation, a layer of structured accelerator programs has developed to nurture high-potential ventures and prepare them for investment and scale. These programs are often supported by international development partners and corporations, blending global expertise with local implementation.

A prominent example is the **Mastercard Foundation EdTech Fellowship**, implemented in Ethiopia by the non-profit organization Reach for Change.<sup>12</sup> This program provides selected EdTech startups with a powerful combination of financial support, intensive business coaching, exposure to global learning science, and access to professional networks. The impact of this model is tangible: the first cohort of 11 Ethiopian EdTech enterprises, including ventures like the multimedia-based

**Whiz Kids** and the personalized learning platform **Globe Dock**, collectively reached over 255,000 learners during their 12-month acceleration period.<sup>13</sup> A second cohort of 13 startups was selected for 2025, indicating the program's continued commitment.<sup>15</sup>

This model of international partnership is further exemplified by the **Orange Digital Centre** in Addis Ababa. A collaboration between the German development agency GIZ, Orange S.A., and the Ethiopian Ministry of Innovation and Technology, this center houses a coding school, a "FabLab Solidaire" for hardware prototyping, and the "Orange Fab" startup accelerator under one roof.<sup>16</sup> This integrated approach creates a direct pipeline, training digital talent in the coding school and then providing a pathway for the most promising entrepreneurs to develop their ideas through the accelerator.

## 2.3 Investment Landscape: Capitalizing Innovation

For the Platinum Economy to mature, innovative ideas must be matched with capital. Ethiopia's investment landscape is evolving, with the emergence of formal investment structures that are beginning to replace the reliance on informal networks. However, analysis reveals a potential "missing middle" in the funding pipeline, where startups struggle to secure crucial seed and Series A funding after graduating from early-stage support.

At the earliest stage, **Addis Ababa Angels (AAA)** plays a critical role. As a network of individual investors, AAA pools financial resources and expertise to back early-stage, tech-enabled businesses.<sup>17</sup> Their investment criteria provide a clear signal to the market about what is considered "investable": a tech-enabled, scalable business model with a proven product-market fit, a completed Minimum Viable Product (MVP), and a strong founding team.<sup>17</sup> For post-revenue companies, AAA requires articulation of key business metrics like Customer Acquisition Cost (CAC), Customer Lifetime Value (CLV), and churn rate, demonstrating a shift towards data-driven investment decisions.<sup>17</sup>

For more established, growth-stage companies, a number of private equity (PE) and venture capital (VC) firms are active. These include **Cepheus Growth Capital**, which focuses on providing long-term growth capital to companies in manufacturing, agro-processing, and services<sup>18</sup>;

**Zoscales Partners**, an East Africa-focused PE fund with offices in Addis Ababa<sup>20</sup>;

**Renew Capital**, a VC firm investing in fintech and foodtech<sup>21</sup>; and

**Schulze Global**, which manages the first private equity SME fund focused on the country.<sup>22</sup>

Despite this progress, overall venture funding in Ethiopia lags significantly behind the African "Big Four" (Nigeria, Kenya, South Africa, Egypt). According to data from Briter Bridges, Ethiopian startups raised just \$14 million between 2015 and 2022, a fraction of the amounts raised in neighboring Kenya (\$1.28 billion).<sup>23</sup> However, there are signs of growing international interest. A notable trend is the recent influx of capital from

Japanese VCs, who have invested \$9 million in the past two years in companies like the software firm

**Addis Software** and the talent platform **Gebeya**, with fintech being a primary target.<sup>23</sup> The government's planned two billion birr Startup Fund is a direct policy response aimed at closing this "missing middle" funding gap.<sup>4</sup>

The following table provides a summary of the key organizations that form the support architecture for Ethiopia's innovation ecosystem.

**Table 1: Ethiopia's Innovation Ecosystem Support Landscape**

Organization Name	Type	Key Services Offered	Target Stage
<b>iceaddis</b> <sup>9</sup>	Innovation Hub / Incubator	Co-working Space, Incubation, Community Building, Startup Support	Ideation, Early Stage
<b>Orbit Innovation Hub</b> <sup>10</sup>	Incubator / Accelerator	Co-working, Mentorship, Legal Advice, Seed Funding, Business Dev. Training	Ideation to Product Launch
<b>icehawassa</b> <sup>11</sup>	Regional Innovation Hub	Co-working Space, Incubation, Training, Entrepreneurship Networks	Early Stage (Regional)
<b>Mastercard Foundation EdTech Fellowship</b> <sup>12</sup>	Accelerator	Financial Support, Business Coaching, Global Network Access, Learning Science	Early Growth (EdTech)
<b>Orange Digital Centre (Orange Fab)</b> <sup>16</sup>	Accelerator / Corporate Hub	Startup Acceleration, Coding School, FabLab, Investment	Early Stage, Talent Dev.
<b>Addis Ababa Angels (AAA)</b> <sup>17</sup>	Angel Investor Network	Equity Investment, Mentorship, Network Access	Early Stage (Post-MVP)



<b>Cepheus Growth Capital</b> <sup>18</sup>	Private Equity Firm	Growth Capital, Strategic Advisory	Growth Stage SMEs
<b>Zoscales Partners</b> <sup>20</sup>	Private Equity Firm	SME Growth Funding, Healthcare & Sustainability Investment	Growth Stage SMEs
<b>Renew Capital</b> <sup>21</sup>	Venture Capital Firm	Seed & Growth Funding (Fintech, Foodtech)	Seed, Growth Stage

## 2.4 University-Industry-Government Nexus

A robust innovation ecosystem requires strong linkages between academia, the private sector, and government. In Ethiopia, this nexus is being deliberately constructed through formal policies and partnerships. As mandated by the STI policy, universities are reorienting themselves to serve industrial needs. AASTU's "University for Industry" mission and its UIL&TT directorate are prime examples of this structural shift, creating formal channels for collaboration.<sup>6</sup>

This collaboration is not just theoretical. The establishment of the **Artificial Intelligence & Robotics Center of Excellence** at AASTU is a joint initiative with the Ministry of Innovation and Technology, designed to conduct applied research that can solve real-world industry problems.<sup>24</sup>

This trilateral relationship is further strengthened by the involvement of international development partners. **JICA's Startup Ecosystem Enhancement Project**, a partnership with MInT, is designed to build a National Master Plan for the ecosystem, conduct research, and, crucially, create networking opportunities between Ethiopian startups and established Japanese corporations.<sup>25</sup> This demonstrates a sophisticated model where development assistance is used not just for direct aid but to build the connective tissue of the ecosystem. This government-to-government development work serves to de-risk the market, providing the market intelligence and formal engagement channels necessary to encourage private-sector commercial investment from abroad—a clear example of a blended finance approach to ecosystem building.

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## Part II: Sub-Sector Deep Dive: Roles, Skills, and Opportunities

This part provides a granular, evidence-based documentation of the workforce within each defined sub-sector of the Platinum Economy. Each chapter follows a consistent structure, analyzing the market landscape, cataloging specific job roles, mapping required competencies, and assessing the growth outlook. This systematic approach allows for a detailed understanding of the human capital dynamics at play and enables cross-sectoral comparisons.

### Chapter 3: Advanced Technology and Digital Innovation

The Advanced Technology and Digital Innovation sub-sector is the engine room of Ethiopia's Platinum Economy. It is characterized by a dynamic interplay of large-scale digital transformation projects, a burgeoning startup scene, and increasing specialization in cutting-edge fields. The workforce demand in this area is intense, revealing a clear hierarchy of skills and a rapidly evolving labor market that is beginning to bifurcate between local and global opportunities.

#### 3.1 Market Landscape and Key Employers

This sub-sector is populated by a diverse array of employers, each contributing to a complex and growing market. **Multinational corporations** are making significant inroads, most notably **Safaricom**, whose entry into the telecommunications market is creating demand for highly skilled technical roles such as DevOps Engineers and Big Data Engineers to build and manage its new infrastructure.<sup>27</sup>

Simultaneously, the incumbent **state-owned enterprise, Ethio Telecom**, is undergoing a massive digital transformation of its own. No longer just a provider of basic connectivity, it is expanding into e-commerce with its "Zemen Gebeya" platform and spearheading smart city development projects, such as the 5G rollout in Bahir

Dar.<sup>28</sup> This strategic pivot is creating a wide range of new technology-focused roles within the public sector.

The backbone of the indigenous tech industry is formed by **established local technology firms**. These include **iCog Labs**, a pioneer in artificial intelligence and robotics research <sup>29</sup>;

**Gebeya**, a SaaS-enabled talent marketplace connecting African tech professionals with opportunities <sup>31</sup>; and

**Addis Software**, which develops enterprise-level solutions for a variety of clients.<sup>33</sup>

Finally, the ecosystem is energized by a vibrant pool of **tech startups** that are applying technology to solve specific market problems. This includes fintech companies like **ArifPay** <sup>34</sup>,

**Chapa** <sup>36</sup>, and

**Kifiya Financial Technology** <sup>37</sup>; logistics and delivery platforms such as

**Deliver Addis** <sup>38</sup> and

**Eshi Express** <sup>39</sup>; and on-demand service platforms like

**Taskmoby**.<sup>40</sup> These startups are a primary source of demand for agile and multi-skilled tech professionals.

## 3.2 Workforce Composition and Role Catalogue

The roles within this sub-sector span a wide spectrum of specialization and seniority, from entry-level developers to C-suite technology leaders. The emergence of roles that focus on scaling, securing, and governing technology—not just building it—is a strong indicator that the sector is moving from a nascent "build" phase to a more mature "scale and operate" phase.

### 3.2.1 Artificial Intelligence and Machine Learning

The application of AI is moving beyond theoretical research and into commercial and public-sector applications, with a clear focus on solving local problems.

- **AI Engineer / Data Scientist (Forecasting, Demand & Pricing Algorithm):** A highly commercial role found at marketplace startups like ChipChip in Addis Ababa. Core responsibilities include developing demand forecasting models using historical data and seasonality, analyzing the ROI of marketing spend, building real-time dynamic pricing algorithms, and creating models to automate inventory control and optimize logistics.<sup>41</sup> This role directly links advanced technical skills to core business metrics.
- **Machine Learning Engineer:** International companies like the gaming firm Playrix are hiring for remote ML Engineer roles accessible to Ethiopian talent. These positions involve developing and supporting ML models for specific product features, such as dynamic difficulty adjustment in games, LTV (Lifetime Value) forecasting, and marketing automation.<sup>42</sup>
- **Machine Learning/Data Science (Natural Language Processing):** A specialized role identified at the startup level, focusing on the "domestication" of technology. Responsibilities include designing language data pipelines and creating translation software for **Amharic text**, requiring collaboration with economists and software engineers.<sup>43</sup> This points to the growing field of computational linguistics tailored to the local context.

### 3.2.2 Software Engineering

Software engineering remains the foundational skillset of the digital economy, with demand spanning from entry-level to senior architectural roles.

- **Software Engineer (Full-Stack, Entry-Level):** A position at a consulting firm like Dulcian Consulting in Addis Ababa, targeting fresh graduates (0-1 year of experience). Responsibilities are broad, covering the design, development, and deployment of full-stack applications with project work that can range from AI to web and mobile apps.<sup>44</sup>
- **Software Engineer (Cloud-Focused, Mid-Level):** A role at a development consulting firm like First Consult, requiring 2+ years of experience. This position

demands strong proficiency in cloud services, particularly **AWS** (EC2, S3, RDS, Lambda), alongside full-stack development skills (e.g., Vue.js, React for frontend; Node.js, Go for backend) and UI design capabilities.<sup>45</sup>

- **Software Development Engineer (Senior/Enterprise):** A senior role found within large institutions like Dashen Bank, requiring at least six years of experience. The focus is on designing, architecting, and developing complex, in-house software solutions. This requires not only deep technical proficiency in languages like C# or Java but also a strong understanding of the specific business needs of the banking sector.<sup>46</sup>
- **Back-End Developer:** A common role at tech firms like ELNET Technology P.L.C. focused on the server-side. Responsibilities include developing and maintaining web applications, designing and managing databases (e.g., MySQL, MongoDB), and creating APIs for integration with other services. Key technologies include Node.js, Python with Django, and Ruby.<sup>47</sup>

### 3.2.3 Cybersecurity and Digital Trust

As the digital economy grows, so does the attack surface, leading to a surge in demand for cybersecurity professionals.

- **Cybersecurity Senior Office:** A strategic role within a financial institution (Awach SACCOS). This position is responsible for the overall security posture of the organization, including developing and implementing security protocols, conducting comprehensive risk assessments, monitoring networks for breaches, and leading incident response. A key requirement is knowledge of international security frameworks like NIST and ISO 27001.<sup>48</sup>
- **Cyber Security Analyst:** A more tactical role, found at institutions like Dashen Bank. Responsibilities include managing day-to-day security operations, ensuring compliance with regulations, participating in business continuity planning, conducting fraud investigations, and running cybersecurity awareness programs for staff.<sup>49</sup>
- **Cybersecurity Engineer:** A hands-on, technical role at systems integrators like Symbol Technologies. This position involves the direct implementation, maintenance, and troubleshooting of cybersecurity systems. Practical experience and professional certifications from vendors like Fortinet, Checkpoint, and Cisco

are highly desired.<sup>51</sup>

### 3.2.4 Blockchain and Distributed Ledger Technologies (DLT)

While still a nascent field in Ethiopia, roles related to blockchain are beginning to appear, particularly in the fintech sector and in remote work contexts.

1. **Chief Technology Officer (CTO):** At the executive level, CTOs at forward-looking financial institutions like Digaf Microfinance are now expected to evaluate emerging technologies, with **blockchain** explicitly mentioned as a key area for assessing competitive advantage.<sup>52</sup>
2. **Risk Manager and Compliance Manager:** This role, also at Digaf, demonstrates the maturation of the sector. The responsibilities now explicitly include the evaluation of risks associated with **blockchain-based systems**, indicating that these technologies are moving from theoretical consideration to practical implementation.<sup>54</sup>
3. **Technical Lead and Architect, Blockchain Full Stack Engineer (Remote):** This is a direct development role advertised by Maroon, a digital asset exchange. The position is open to Ethiopian talent and represents a high-skill, high-value opportunity to work at the core of DLT development, albeit for an international company.<sup>55</sup>

### 3.2.5 Internet of Things (IoT) and Robotics

This field is primarily in the research and development stage within Ethiopia, with talent being cultivated in academic settings.

4. **Robotics Research Projects:** While commercial job postings for robotics engineers are scarce, university innovation programs are fostering foundational skills. Addis Ababa Science and Technology University's UIL&TT directorate showcases student projects such as a "Dish collecting and washing robot," a "Humanoid Robot," and various "Robotic arm" applications.<sup>6</sup> These projects indicate that the talent pipeline for robotics is being built.
5. **International Remote Opportunities:** Job ads from the US for roles like

"Robotics Systems Engineer" <sup>56</sup> illustrate the types of advanced positions that could become accessible to this emerging pool of Ethiopian talent through remote work arrangements as their skills mature.

### 3.3 Competency and Qualification Matrix

An analysis of job requirements across the sub-sector reveals a clear and consistent set of expected competencies.

6. **Technical Skills:** There is a high demand for proficiency in **Python** and its associated data science and machine learning libraries (e.g., TensorFlow, PyTorch, Scikit-learn, Pandas).<sup>41</sup> Strong **SQL** skills for data manipulation and retrieval are a near-universal requirement.<sup>41</sup> Expertise in cloud platforms, especially **AWS**, is increasingly essential for infrastructure and development roles.<sup>45</sup> Modern software development practices necessitate skills in containerization tools like **Docker** and **Kubernetes**.<sup>45</sup> A full-stack skill set often requires knowledge of front-end frameworks like **Vue.js** and **React**, coupled with back-end languages such as **Node.js**, **Go**, **C#**, or **Java**.<sup>45</sup> Cybersecurity roles demand specific knowledge of security tools (SIEM, firewalls) and governance frameworks (NIST, ISO 27001).<sup>48</sup>
7. **Analytical Capabilities:** Job descriptions consistently emphasize the need for strong analytical and problem-solving skills. Beyond just writing code, employers seek professionals who can interpret complex business requirements and translate them into effective technical solutions.<sup>46</sup> A capacity for data-driven decision-making is highly valued, particularly in AI and data science roles.<sup>41</sup>
8. **Soft Skills:** Technical expertise alone is insufficient. There is a strong emphasis on soft skills, including effective **collaboration** within cross-functional teams, clear **communication** with both technical and non-technical stakeholders, **creativity** in problem-solving, and a **proactive** work ethic.<sup>43</sup>
9. **Qualifications and Credentials:** A Bachelor's degree in Computer Science, Software Engineering, or a closely related technical field is the standard minimum qualification for most roles.<sup>44</sup> For more senior data science and research positions, an advanced degree (Master's or PhD) is often preferred or required.<sup>42</sup> Professional certifications serve as a powerful signal of specialized expertise and



are highly valued by employers. These include CISSP, CISM, and CEH for cybersecurity professionals <sup>48</sup>, and vendor-specific certifications like Fortinet, Checkpoint, and Cisco for cybersecurity and network engineers.<sup>51</sup>

### 3.4 Employment and Compensation Structure

The employment landscape in this sub-sector is diverse, offering a full spectrum of arrangements. This includes stable, permanent full-time positions, particularly at established corporations and financial institutions <sup>46</sup>; fixed-term contract roles, often for specific projects <sup>43</sup>; and a rapidly growing number of remote work opportunities with international companies.<sup>42</sup>

This diversity in employment type corresponds to a clear, three-tiered labor market in terms of compensation.

10. **Tier 1 (Local Entry-Level):** These roles, typically for recent graduates, offer competitive local salaries, often supplemented with performance-based bonuses.<sup>44</sup>
11. **Tier 2 (Local Senior/Specialist):** These are positions at major local corporations, banks, and government agencies for experienced professionals. They offer higher local salaries and more comprehensive benefits packages.<sup>46</sup>
12. **Tier 3 (International Remote):** These roles, offered by foreign companies, provide compensation based on global market rates, often in USD. A remote Data Scientist role, for example, might be advertised at \$1,000-\$1,350 per month <sup>61</sup>, while a highly specialized remote Blockchain Engineer position could command a salary of \$60,000-\$75,000 per year.<sup>55</sup> The existence of this tier creates a powerful wage arbitrage opportunity for highly skilled Ethiopian professionals and establishes a very different career trajectory and earning potential compared to the local market. This bifurcation has profound implications for talent retention strategies for domestic companies.

### 3.5 Sub-Sector Growth Trajectory and Outlook

The growth outlook for the Advanced Technology and Digital Innovation sub-sector is exceptionally strong. The momentum is fueled by the government's *Digital Ethiopia 2025* strategy <sup>62</sup>, the explosive growth of the fintech sector <sup>63</sup>, and the market entry of major international players like Safaricom.<sup>27</sup>

Projections from industry analysts quantify this rapid expansion. Nucamp forecasts a 75% increase in job openings for AI and machine learning specialists by 2024 and a compound annual growth rate of 15.27% for cybersecurity jobs.<sup>62</sup> The GSMA's comprehensive report on Ethiopia's digital economy provides the most striking forecast: by 2028, the sector is projected to contribute over ETB 1.3 trillion to the national GDP and, most significantly, create over 1 million new jobs.<sup>3</sup> This projection firmly establishes the sub-sector as a primary engine of future economic growth and employment for the nation.

## Chapter 4: Research and Scientific Work

The Research and Scientific Work sub-sector forms the intellectual foundation of the Platinum Economy. It is where new knowledge is generated, fundamental problems are investigated, and the next generation of high-level talent is trained. This sub-sector is characterized by a strong public-sector presence, anchored by national research institutes and universities, and is increasingly focused on applied, problem-solving research that aligns with national development priorities. International collaboration is a key feature, providing access to funding, expertise, and global research networks.

### 4.1 Market Landscape and Key Employers

The primary employers in this sub-sector are public institutions mandated to advance Ethiopia's scientific and technological capabilities.

13. **National Research Institutes:** These are specialized centers of excellence. The **Ministry of Innovation and Technology (MinT)** serves as the parent ministry for many of these bodies.<sup>64</sup> Key institutes include:

1. The **Ethiopian Artificial Intelligence Institute (EAI)**, a pioneering center for AI research focusing on local challenges in sectors like agriculture and healthcare.<sup>65</sup>
  2. The **Bio and Emerging Technology Institute (BETin)**, formerly the Ethiopian Biotechnology Institute, which conducts research in plant, animal, health, environmental, and industrial biotechnology, as well as in emerging fields like nanotechnology and genomics.<sup>67</sup>
  3. The **Space Science and Geospatial Institute (SSGI)**, formed from the merger of the former Space Science and Technology Institute and the Geospatial Information Institute, focuses on developing national capacity in satellite technology, geospatial information, and aerospace science.<sup>69</sup>
  4. The **Ethiopian Public Health Institute (EPHI)**, which conducts critical research on infectious diseases, nutrition, and health systems.<sup>71</sup>
  5. The **Ethiopian Science and Technology Commission (ESTC)**, which plays a role in shaping the national research agenda and fostering innovation.<sup>73</sup>
14. **Universities:** Higher education institutions are the largest employers of researchers and academic staff. The most prominent is **Addis Ababa University (AAU)**, the country's oldest and largest research university, with numerous colleges and research institutes.<sup>74</sup> It is joined by a growing number of other major public universities with strong research programs, including **Addis Ababa Science and Technology University (AASTU)** <sup>76</sup>, **Jimma University** <sup>78</sup>, **University of Gondar** <sup>79</sup>, **Mekelle University** <sup>80</sup>, and **Bahir Dar University**.<sup>81</sup> These institutions house the majority of the nation's PhD-level experts and are the primary sites for postgraduate and postdoctoral research.
15. **International Collaborations and NGOs:** A significant portion of research is funded and conducted in partnership with international bodies. Organizations like the **World Bank** <sup>82</sup>, **USAID** <sup>84</sup>, **GIZ** <sup>16</sup>, and **JICA** <sup>25</sup> fund and support research projects, often in collaboration with local universities and government institutes.

## 4.2 Workforce Composition and Role Catalogue

The workforce in this sub-sector is highly educated and specialized, ranging from technical support staff to principal investigators leading large-scale projects.

#### 16. **Academic and Applied Research:**

1. **Professor / Associate Professor / Assistant Professor:** These are the core academic and research roles at universities. Job postings, such as those for Madda Walabu University, explicitly require a PhD and involve teaching postgraduate students and actively participating in and guiding their research projects.<sup>88</sup>
2. **Researcher:** Found at national institutes like EAll <sup>65</sup> and BETin.<sup>67</sup> These roles involve conducting research in specific domains, such as AI for coffee disease detection <sup>65</sup> or genetic diversity in Ethiopian crops.<sup>67</sup>
3. **Postdoctoral Fellow/Research Fellow:** These are temporary research positions for recent PhD graduates to gain further experience and publish their work. While not explicitly listed in all job portals, they are a standard component of the academic career path at major research universities like AAU.
4. **PhD Candidate:** A student-researcher role, often funded through research grants or university scholarships. Their work constitutes a significant portion of the research output, as seen in the AAU thesis repository.<sup>89</sup>

#### 17. **Research Project Management:**

1. **Research Project Manager:** This role involves overseeing the lifecycle of funded research initiatives, managing budgets, coordinating with partners, and ensuring deliverables are met. The complexity of projects funded by the World Bank or AfDB necessitates professional project management.
2. **Research Grant Management Officer:** A role within university directorates, such as at AASTU, responsible for managing the administration of research grants.<sup>24</sup>

#### 18. **Laboratory Operations and Technical Support:**

1. **Laboratory Technician/Manager:** Essential support roles for the functioning of research labs at institutions like EPHI or the various science and engineering colleges at universities. They are responsible for maintaining equipment, preparing samples, and assisting researchers.
2. **Data Clerk:** A critical support role, particularly in large-scale health research projects. The suspension of USAID funding highlighted the importance of these roles, with 10,000 data clerks responsible for managing HIV treatment

data losing their jobs, severely impacting data management capacity.<sup>85</sup>

19. **Science Communication and Knowledge Translation:**

1. **Knowledge Translation Specialist:** A role within research institutes like EPHI's Health System Research Directorate, focused on bridging the gap between research findings and policy/practice.<sup>72</sup>
2. **Science Communicator / Public Relations Officer:** Roles responsible for disseminating research findings to the public, policymakers, and other stakeholders, often through reports, press releases, and digital media.

### 4.3 Competency and Qualification Matrix

The qualifications for roles in this sub-sector are among the most stringent in the Platinum Economy.

20. **Formal Education:** A **PhD** is the standard and often mandatory qualification for senior academic and research positions (Professor, Senior Researcher).<sup>88</sup> A **Master's degree** (MSc, MA) is typically the minimum requirement for mid-level research roles and for admission into PhD programs. A **Bachelor's degree** (BSc, BA) in a relevant STEM field is the entry point for research assistant and technical support roles.

21. **Technical and Domain-Specific Skills:**

1. **Research Methodologies:** Deep expertise in quantitative and/or qualitative research methods is essential. This includes experimental design, statistical analysis, and data modeling.
2. **Laboratory Skills:** For life sciences and engineering, proficiency with specialized laboratory equipment and techniques (e.g., genetic sequencing, materials characterization, diagnostic assays) is critical.
3. **Computational Skills:** Increasingly, researchers across all disciplines need computational skills. This includes proficiency in programming languages like **Python** or **R** for data analysis and modeling, as well as experience with specialized software (e.g., SPSS, MATLAB, GIS software).<sup>6</sup>
4. **Data Analysis and Visualization:** The ability to work with large datasets, perform statistical analysis, and use tools like Power BI or Tableau to visualize findings is becoming a core competency.<sup>82</sup>

22. **Analytical Capabilities:** A high level of critical thinking, the ability to synthesize

complex information, and a probing mind for insightful conclusions are paramount.<sup>61</sup> The ability to write and publish peer-reviewed research articles is the primary measure of analytical output.

23. **Soft Skills:** Collaboration is key, as much of the research is co-authored and involves international partnerships.<sup>65</sup> Strong written and oral communication skills are necessary for writing grant proposals, publishing articles, and presenting findings at conferences.<sup>46</sup>

#### 4.4 Employment and Compensation Structure

24. **Employment Types:** The majority of roles are **permanent** positions within government-funded universities and research institutes. **Contract-based** positions are common for roles tied to specific, time-bound research projects, often funded by international donors. **Fellowships** (e.g., postdoctoral) are typically fixed-term appointments of one to three years.
25. **Compensation:** Compensation for public sector research and academic roles is determined by government salary scales. These are generally lower than what can be obtained in the private sector or through international remote work. For example, a university lecturer's salary would be significantly less than that of a senior software engineer at a private bank. However, these roles often come with non-monetary benefits such as academic freedom, opportunities for international travel, and job security. Positions funded by international organizations like the World Bank or UN agencies offer significantly higher, internationally competitive salaries.<sup>82</sup>

#### 4.5 Sub-Sector Growth Trajectory and Outlook

The growth of the research and scientific work sub-sector is directly tied to government policy and investment. The STI policy's focus on building a knowledge-based economy and the 70:30 university enrollment ratio favoring STEM fields suggest a long-term commitment to expanding the research workforce.<sup>5</sup> The establishment of new, specialized institutes like EAll and BETin further indicates a strategic investment in building national research capacity.<sup>65</sup>

However, the sector is also highly dependent on international funding and collaboration. The suspension of USAID funding, which led to the loss of thousands of healthcare worker and data clerk jobs, demonstrates the vulnerability of the sector to shifts in donor priorities.<sup>85</sup>

The future outlook is one of steady but constrained growth. The demand for applied research that can solve pressing national challenges in agriculture, health, and industry will continue to increase. The growth of other Platinum Economy sub-sectors, particularly Advanced Technology and Health Innovation, will create a virtuous cycle, increasing the demand for local R&D and highly skilled researchers. The key challenge will be to secure sustainable, long-term funding, both domestically and internationally, and to create career pathways that can retain top research talent in the face of more lucrative opportunities in the private sector.

## **Chapter 5: High-End Professional and Management Consulting**

The High-End Professional and Management Consulting sub-sector serves as a critical enabler for the rest of the Platinum Economy. Consultants in this space provide the strategic guidance, operational expertise, and specialized knowledge that organizations across the public and private sectors need to navigate complexity, implement change, and achieve high performance. The Ethiopian consulting market is maturing, with a growing presence of both global firms and specialized local consultancies, all competing to support the country's ambitious transformation agenda.

### **5.1 Market Landscape and Key Employers**

The consulting landscape in Ethiopia is diverse, comprising global powerhouses, local specialists, and independent experts.

26. **Global Consulting Firms:** The "Big Four" professional services firms and major strategy consultancies have a presence in Ethiopia, often serving multinational clients, large local corporations, and international development agencies. While



not all have large, permanent offices, their influence is significant.

1. **Deloitte:** Re-established its office in Addis Ababa in 2023, providing advisory services across sectors including government, international development, and private companies. Their services include strategy, mergers & acquisitions, tax technology consulting, and digital transformation.<sup>92</sup>
2. **PwC (PricewaterhouseCoopers):** Operates in Ethiopia as part of its Africa Central network, providing assurance, tax, and advisory services. Their advisory practice focuses on financial effectiveness, performance improvement, technology, and risk management.<sup>94</sup> They also produce key reports on the local business environment, such as updates on tax law and economic liberalization.<sup>95</sup>
3. **KPMG:** Operates in Ethiopia as part of its East Africa practice. They offer a wide range of advisory services, including financial risk management, technology innovation, and people & change consulting. They are actively hiring for roles like "Artificial Intelligence – Technology Innovation, Senior Manager" for the region.<sup>97</sup>
4. **McKinsey & Company:** While they do not have a dedicated office in Ethiopia, they serve the market from their regional hubs (e.g., Johannesburg) and actively recruit talent from Ethiopia for roles in digital technology, data science, and consulting.<sup>99</sup> They also publish influential reports on key Ethiopian sectors like apparel sourcing and agriculture.<sup>100</sup>
5. **Boston Consulting Group (BCG):** Serves the Ethiopian market from its Nairobi hub, which covers East Africa. They recruit for consulting roles and offer expertise in digital, technology, and data strategy.<sup>102</sup>
27. **Local and Specialized Consulting Firms:** Addis Ababa is home to a growing number of local consulting firms that offer specialized services tailored to the Ethiopian context. These firms often compete on local knowledge, agility, and cost-effectiveness. Examples include:
  1. **Novatia Consulting:** A leading management consulting company in Addis Ababa specializing in strategic planning, operational improvements, market research, and digital transformation.<sup>104</sup>
  2. **Gasha Consulting:** An Ethiopian firm with consultants from Ethiopia, the US, and Europe, offering management consulting, IT consulting (IT strategy, security, cloud computing), and business process outsourcing.<sup>106</sup>
  3. **MERQ Consultancy:** Focuses on the health sector, providing services in monitoring & evaluation, research, quality improvement, and information systems & digital health.<sup>108</sup>

4. **Impact Consulting:** Provides audit, consulting, tax, and advisory services.<sup>109</sup>
5. **The Talent Firm:** Specializes in human resource management services.<sup>109</sup>
6. **Apex Business and IT Consultancy (apexhab):** Offers business plan development, feasibility studies, tax law consulting, and market analysis.<sup>110</sup>

## 5.2 Workforce Composition and Role Catalogue

The roles in this sub-sector demand a blend of analytical rigor, industry expertise, and strong client-facing skills.

### 28. Strategic and Management Consulting:

1. **Consultant / Associate:** The core role at firms like BCG and McKinsey. Responsibilities involve analyzing complex business problems, developing data-driven recommendations, and presenting findings to senior clients. Requires strong analytical, problem-solving, and communication skills.<sup>103</sup>
2. **Management Consultant:** A generalist role at firms like Novatia or Gasha, focused on areas like strategic planning, operational excellence, and organizational development.<sup>104</sup> A dissertation on the topic highlighted key success factors for such projects in Ethiopia, including client readiness, mutual trust, and project timing.<sup>111</sup>
3. **Project Leader / Manager:** Leads consulting teams, manages client relationships, and is responsible for project delivery. This is a mid-to-senior level position requiring significant experience.<sup>103</sup>

### 29. Digital Transformation and Technology Advisory:

- **Digital Development Specialist:** A role at an organization like the World Bank, based in Addis Ababa. Responsibilities include advising government clients on strategies and best practices for developing their digital economies, including policy, legal, and regulatory frameworks for the ICT sector.<sup>83</sup>
- **IT Consultant:** A role at firms like Gasha Consulting or Addis Software, providing advice on IT strategy, technology implementation, performance improvement, and cybersecurity.<sup>107</sup>
- **Artificial Intelligence – Technology Innovation, Senior Manager:** A senior advisory role advertised by KPMG for its East Africa practice. This indicates a growing demand for high-level strategic advice on emerging technologies like

AI.<sup>97</sup>

- **Tax Technology Consultant:** A specialized role at firms like Deloitte, focused on advising clients on the technology solutions used for tax compliance and reporting.<sup>92</sup>

### 30. Specialized Domain Expertise:

- **Financial Analyst / Finance Analyst:** A role at the World Bank in Addis Ababa, supporting budget activities, producing reports, and performing financial analysis using systems like SAP and Power BI. Requires a background in finance, accounting, or economics.<sup>82</sup>
- **Human Resources Consultant:** A specialist at firms like The Talent Firm, providing services related to talent management, organizational structure, and HR systems.<sup>109</sup>
- **District Nutrition Governance Officer:** A highly specialized consulting role advertised by Deloitte, demonstrating the need for deep domain expertise in specific development sectors.<sup>113</sup>

### 31. Interim and Leadership Roles:

- While not explicitly listed in job ads, the consulting model often includes providing interim executive leadership (e.g., an interim CTO or CFO) to clients undergoing major transformations. This is a common service offering for senior partners at major consulting firms.

## 5.3 Competency and Qualification Matrix

Entry into the high-end consulting world is highly competitive and requires a strong academic and professional background.

- **Formal Education:** An **MBA** or other advanced degree (Master's, PhD) from a top-tier university is often a prerequisite for strategy consulting roles at firms like McKinsey and BCG. For other consulting roles, a Bachelor's degree in a relevant field (Business, Economics, Engineering, Computer Science) is the minimum requirement.<sup>82</sup>
- **Technical and Domain-Specific Skills:**
  - **Financial Modeling and Analysis:** The ability to build complex financial models, analyze financial statements, and conduct valuations is a core skill.
  - **Data Analysis:** Proficiency with data analysis tools and techniques is

essential. This can range from advanced Excel skills to experience with statistical software or data visualization tools like Power BI.<sup>82</sup>

- **Industry Knowledge:** Deep expertise in a specific sector (e.g., financial services, telecommunications, public health, energy) is highly valued and often a key differentiator.<sup>92</sup>
- **Technology Fluency:** Consultants, especially in digital transformation roles, must be fluent in current technology trends, including cloud computing, AI, and enterprise software (e.g., SAP, Oracle).<sup>82</sup>
- **Analytical Capabilities:** This is the most critical competency. Consultants must possess exceptional problem-solving skills, the ability to structure and analyze ambiguous problems, quantitative aptitude, and the ability to synthesize vast amounts of information into clear, actionable insights.<sup>91</sup>
- **Soft Skills:** Excellent communication (written and oral), presentation skills, and the ability to build relationships and influence senior stakeholders are non-negotiable. Teamwork, leadership, and a high degree of professionalism are also essential.<sup>46</sup>

## 5.4 Employment and Compensation Structure

- **Employment Types:** The dominant employment model is **permanent, full-time** employment with a consulting firm. **Contract-based** or **freelance** arrangements are also common, where independent consultants are brought in for specific projects or specialized expertise.
- **Compensation:** Compensation in this sub-sector is among the highest in the Platinum Economy. Global consulting firms offer internationally competitive salary packages, often including significant performance bonuses, to attract top talent. Local firms offer salaries that are at the high end of the Ethiopian market. These roles are highly sought after, and the remuneration reflects the high-pressure, high-impact nature of the work.

## 5.5 Sub-Sector Growth Trajectory and Outlook

The outlook for the management consulting sub-sector in Ethiopia is very positive. Its

growth is intrinsically linked to the growth and complexity of the rest of the economy. Several factors are driving demand:

- **Economic Liberalization:** The opening of key sectors like telecommunications and banking to foreign investment creates a massive demand for advisory services in market entry strategy, mergers and acquisitions, and regulatory compliance.<sup>96</sup>
- **Digital Transformation:** The government's *Digital Ethiopia 2025* strategy and the private sector's push for digitalization are creating a huge market for technology and digital transformation consulting.<sup>1</sup>
- **Large-Scale Infrastructure Projects:** Major projects like the Grand Ethiopian Renaissance Dam (GERD) and the development of industrial parks require extensive advisory services in project management, finance, and operations.<sup>114</sup>
- **International Development Funding:** The significant flow of funding from development partners like the World Bank and AfDB for policy reform and capacity-building projects directly translates into consulting engagements.<sup>116</sup>

The increasing complexity of the Ethiopian market ensures that the demand for high-end strategic advice will continue to grow. The primary challenge for the sub-sector will be talent: finding and retaining professionals with the right blend of global-standard consulting skills and deep local context.

## Chapter 6: Creative and Cultural Industries at Scale

Ethiopia's Creative and Cultural Industries (CCI) are transitioning from a collection of artisanal practices into a more formalized and economically significant sub-sector of the Platinum Economy. This evolution is driven by the rise of digital platforms, a growing domestic consumer market, and a strategic push to leverage the country's rich cultural heritage for economic benefit. This sub-sector encompasses a wide range of activities, from large-scale film and media production to advanced design and digital content strategy, creating a new generation of high-value creative and technical roles.

### 6.1 Market Landscape and Key Employers

The creative landscape is a mix of established media houses, agile production companies, advertising agencies, and a growing number of independent creators.

- **Media and Production Companies:**

1. **Zeleman Communications, Advertising, and Production PLC:** A major integrated agency offering services in advertising, video production, branding, and media planning. They are a significant employer of creative professionals in Addis Ababa.<sup>118</sup>
2. **Mekdi Production PLC:** A leading film company established in 2009, known for producing TV series like "Gimash Chereka" and a wide range of TV and radio advertisements for major clients.<sup>120</sup>
3. **A51 Pictures:** Founded by an award-winning producer/director team, this company produces content for both Ethiopian and international markets. They produced the first five seasons of the teen drama series *Yegna* and the feature film *Sweetness in the Belly*, which premiered at the Toronto International Film Festival.<sup>121</sup>
4. **Other Production Houses:** The market includes a variety of other players like **Opanther Media Production & Design**<sup>118</sup>, **Ayaana Media + Publishing**<sup>122</sup>, and **Gobez Media**<sup>123</sup>, each contributing to the production of film, TV, and digital content.

- **Advertising and Creative Agencies:**

- **Cactus Ethiopia:** One of the most established agencies in the country, with over 20 years of experience. They provide 360-degree campaigns, strategy development, digital services, and media planning and buying for major brands like Heineken and Zamzam Bank.<sup>124</sup>
- **Berry Advertising** and **251 Communications and Marketing** are other key players offering branding, digital strategy, and public relations services.<sup>125</sup>

- **Digital Media and Gaming:**

- **Shega Media and Technology:** A digital media and data company focused on covering Ethiopia's innovative ecosystem. They produce news, analysis, reports, and newsletters, positioning themselves as a "mix between Bloomberg, Techcrunch, and CB Insight for emerging markets".<sup>126</sup>
- **Qene Games:** An award-winning game development studio that has produced successful mobile games like *Kukulu* and *Gebeta*, demonstrating a growing capacity in the interactive media space.<sup>127</sup>

- **Public and Cultural Institutions:**

- **Ethiopian Broadcasting Corporation (EBC):** The state-owned public service broadcaster is the country's oldest and largest, serving as a major employer for media professionals.<sup>128</sup>
- **UNESCO and British Council:** These international organizations play a crucial role in supporting the creative economy through funding and research. A 2022 British Council report mapped the Ethiopian creative ecosystem, and a UNESCO project is providing over \$1 million to support the creative economy, including a project to strengthen the children's literature ecosystem in Ethiopia.<sup>129</sup>

## 6.2 Workforce Composition and Role Catalogue

The roles in the creative industries are becoming more specialized and technologically demanding.

- **Creative Direction and Production:**

- **Documentary Producer:** A role at an organization like the Ethiopian Red Cross Society (ERCS). Responsibilities include planning, directing, producing, and editing documentary content. This requires strong storytelling expertise, technical proficiency in video production, and the ability to develop scripts and manage production timelines and budgets.<sup>132</sup>
- **Creative Director:** Leads the creative vision for campaigns at advertising agencies or for large-scale media projects. This senior role involves guiding teams of writers, designers, and producers.
- **Film Director/Producer:** The primary creative and managerial roles in film production, as exemplified by the founders of A51 Pictures.<sup>121</sup>

- **Advanced Design and Digital Media:**

- **UI/UX Designer:** A critical role bridging technology and design. A posting at Kifiya Financial Technologies requires the designer to transform software into intuitive digital experiences, create storyboards and process flows, develop UI mockups and prototypes, and conduct user testing. Proficiency in tools like Figma, Adobe Illustrator, and Photoshop is essential.<sup>133</sup>
- **Graphic Designer:** A role found at various agencies and companies. A posting on HahuJobs for a graphics designer requires skills in creating visual



materials, UI/UX designs, and posters.<sup>134</sup>

- **Digital Content Strategist:** A role focused on planning and executing content across multiple digital platforms to drive engagement and achieve business goals. This is a core function at agencies like Cactus Ethiopia<sup>124</sup> and media outlets like Shega.<sup>126</sup>
- **Technical Production and Post-Production:**
  - **Video Editor:** A technical role responsible for editing raw footage into a final product. Job ads require a Bachelor's degree in Film Editing or a related field and proficiency with industry-standard software.<sup>134</sup> The Documentary Producer role at ERCS also requires strong editing skills using software like Adobe Premiere Pro or Final Cut Pro.<sup>132</sup>
  - **Videographer and Photographer:** A combined role responsible for capturing high-quality visual content. Job ads require experience and technical skill with camera equipment.<sup>134</sup>
  - **Camera Technician:** A specialized technical role, such as one advertised by AMG Steel Factory, responsible for the technical operation of camera equipment during productions.<sup>134</sup>
- **Cultural Management and Export:**
  - **Cultural Export Manager:** This emerging role focuses on packaging and promoting Ethiopian creative products (e.g., film, music, fashion) for international markets. This is supported by the government's efforts to protect and promote creative outputs.<sup>7</sup>
  - **Communications and Publication Officer:** A role at organizations like the Ethiopian Solar Energy Development Association (ESEDA) that involves managing communications, creating publicity campaigns, and producing high-quality photos and videos for events.<sup>134</sup>

### 6.3 Competency and Qualification Matrix

- **Formal Education:** A Bachelor's degree in a relevant field—such as Film Production, Graphic Design, Communications, Journalism, or Fine Arts—is increasingly the standard for professional roles.<sup>132</sup> For technical roles like UI/UX design, a degree in Computer Science or a related field is also common.<sup>133</sup>
- **Technical Skills:**
  5. **Software Proficiency:** High proficiency in industry-standard software is

non-negotiable. For design, this includes the **Adobe Creative Suite (Illustrator, Photoshop, InDesign)**.<sup>133</sup> For video production, it includes **Adobe Premiere Pro, Final Cut Pro, or DaVinci Resolve**.<sup>132</sup> For UI/UX, it includes wireframing and prototyping tools like **Figma or InVision**.<sup>133</sup>

6. **Technical Production:** Skills in cinematography, lighting, sound recording, and operating professional camera equipment are essential for production roles.<sup>132</sup>
- **Creative and Strategic Capabilities:**
  - **Storytelling:** The ability to craft compelling narratives is the core competency for producers, directors, and content creators.<sup>132</sup>
  - **Design Thinking:** For UI/UX and product designers, a deep understanding of user-centric design principles, user journey mapping, and usability testing is critical.<sup>133</sup>
  - **Strategic Communication:** The ability to develop and execute communication strategies that align with organizational goals is key for roles in advertising, PR, and corporate communications.<sup>124</sup>
- **Soft Skills:** Collaboration, communication, project management, and the ability to work to tight deadlines are essential in the fast-paced, project-based environment of the creative industries.<sup>133</sup>

## 6.4 Employment and Compensation Structure

- **Employment Types:** The creative industries feature a mix of employment models. **Permanent, full-time** positions are common in larger advertising agencies, media houses, and in-house corporate creative teams.<sup>120</sup> However, the sector is heavily reliant on **freelance** and **contract-based** work, with producers, directors, editors, and designers often engaged on a per-project basis. This project-based nature provides flexibility but can also lead to income instability.
- **Compensation:** Compensation varies widely based on experience, reputation, and the nature of the employer. Roles at major international advertising agencies or on internationally funded productions command higher salaries. A report by UNCTAD notes that the film and audio-visual industry in Ethiopia is estimated to generate up to \$70 million annually, indicating a significant flow of capital into

the sector that supports these professional salaries.<sup>130</sup>

## 6.5 Sub-Sector Growth Trajectory and Outlook

The Creative and Cultural Industries in Ethiopia are poised for significant growth. The British Council's 2022 mapping report highlights that the creative sector provides substantial social, cultural, and economic growth opportunities, particularly for youth, women, and minority groups.<sup>130</sup>

Several factors are driving this growth:

- **Government and Policy Support:** The 2018 ratification of the national film policy was a paramount achievement for the sector.<sup>135</sup> The government is actively working to protect creative outputs through strengthened IP laws and new systems to enhance their national impact.<sup>7</sup>
- **Digital Distribution:** The shift to digital platforms, as seen with artists premiering work on YouTube, is changing the economics of the industry and providing new avenues for monetization and audience reach.<sup>136</sup>
- **International Investment:** The UNESCO IFCD fund's investment in strengthening Ethiopia's children's literature ecosystem is a clear example of international support for the sector's development.<sup>129</sup>

The primary challenges remain access to formal education and training, resource accessibility, and limited stakeholder participation outside of Addis Ababa.<sup>130</sup>

However, the combination of a rich cultural foundation, a large and youthful population, and increasing policy and financial support creates a strong positive outlook for the continued professionalization and economic scaling of Ethiopia's creative industries.

## Chapter 7: Entrepreneurship and Startup Ecosystem

The Entrepreneurship and Startup Ecosystem sub-sector is both a product and a driver of the Platinum Economy. It represents the nexus of innovation, capital, and

talent, where new ventures are created to capitalize on emerging market opportunities, particularly in technology. The ecosystem is in a phase of rapid formalization, moving from an informal, community-based structure to one defined by structured investment, policy support, and a growing class of professional ecosystem builders.

## 7.1 Market Landscape and Key Employers

The "employers" in this sub-sector are a unique mix of the startups themselves and the organizations that support them.

- **Startups:** The most visible actors are the startups founded by entrepreneurs. This report has identified numerous examples, including fintechs like **ArifPay**<sup>34</sup> and **Chapa**<sup>36</sup>; e-commerce and logistics firms like **Deliver Addis**<sup>38</sup> and **Eshi Express**<sup>39</sup>; EdTech companies like **Whiz Kids** and **Qalam Education**<sup>14</sup>; and platform businesses like **Gebeya**<sup>32</sup> and **Taskmoby**.<sup>40</sup> These companies are the primary source of founding and early-employee roles.
- **Innovation Hubs, Accelerators, and Incubators:** These organizations are key employers of ecosystem professionals. They include **iceaddis**<sup>9</sup>, **Orbit Innovation Hub**<sup>10</sup>, **icehawassa**<sup>11</sup>, and the implementing partners of major programs like **Reach for Change** (for the Mastercard Foundation EdTech Fellowship).<sup>12</sup>
- **Investment Firms:** Angel networks and VC/PE firms also employ professionals to manage their operations. This includes the leadership of **Addis Ababa Angels**<sup>17</sup> and the teams at firms like **Cepheus Growth Capital**<sup>18</sup> and **Zoscales Partners**.<sup>20</sup>
- **Government and Development Agencies:** Government bodies like the **Ministry of Innovation and Technology (MINT)**, particularly its "Startup Desk"<sup>4</sup>, and international partners like **JICA**, which is implementing the Startup Ecosystem Enhancement Project<sup>25</sup>, are

also key players in shaping and managing the ecosystem.

## 7.2 Workforce Composition and Role Catalogue

The roles within this sub-sector are diverse, reflecting the various functions needed to build both individual companies and the ecosystem as a whole.

- **Startup Founding and Leadership:**

- **Founder / Co-Founder:** The primary entrepreneurial role. Success requires a unique blend of vision, resilience, risk-taking, and the ability to attract talent and capital. The criteria from Addis Ababa Angels highlight the expected traits: self-motivation, a visionary outlook, and the ability to "go against the grain".<sup>17</sup>
- **Chief Executive Officer (CEO):** The leader responsible for the overall strategy, growth, and management of a startup. Examples include the CEOs of Shega<sup>137</sup> and Dodai.<sup>23</sup>
- **Chief Operations Officer (COO):** Responsible for managing the day-to-day operations of the company. The COO of HahuJobs, for example, is also a system analyst and solutions architect, demonstrating the hands-on, technical nature of leadership in tech startups.<sup>138</sup>

- **Ecosystem Management and Development:**

- **Accelerator/Incubator Program Manager:** Manages the lifecycle of an accelerator program, from startup selection and onboarding to curriculum delivery, mentorship matching, and organizing demo days. This is a core role at organizations like Reach for Change and Orbit Innovation Hub.
- **Ecosystem Community Manager:** Responsible for building and engaging the community around a hub or accelerator. This involves organizing events, managing communications, and fostering a collaborative environment.
- **Head of Startup Desk:** A government role within MInT or the Ethiopian Investment Commission, responsible for implementing the Startup Proclamation, managing the registration of startups, and coordinating support services.<sup>4</sup>

- **Venture Building and Investment:**

- **Venture Builder / Startup Studio Operator:** Works within a structured environment to systematically build and launch new companies, often

providing the initial idea, team, and capital.

- **Venture Capital / Angel Investment Analyst:** Responsible for deal sourcing, conducting due diligence on potential investments, analyzing business models and financial projections, and supporting portfolio companies. This is a key role within firms like Renew Capital or for the members of Addis Ababa Angels.
- **Startup Support and Advisory:**
  1. **Startup Consultant:** Provides specialized advice to startups on areas like business strategy, fundraising, legal structuring, and market entry. Orbit Innovation Hub, for example, explicitly offers legal advice as part of its services.<sup>10</sup>
  2. **Mentor:** An experienced entrepreneur, investor, or industry expert who provides guidance and support to startup founders. Mentorship is a core component of nearly all accelerator and incubator programs.<sup>10</sup>

### 7.3 Competency and Qualification Matrix

- **For Founders:** While there are no formal qualifications, successful founders typically exhibit a specific set of traits and skills: deep domain knowledge, a strong entrepreneurial spirit, resilience, and networking ability.<sup>17</sup> They must also have a proven product-market fit and, ideally, a co-founder with complementary skills.<sup>17</sup>
- **For Ecosystem Professionals:**
  - **Formal Education:** A background in business, finance, economics, or a related field is common for program management and investment roles.
  - **Experience:** Prior experience in project management, business development, or venture capital is highly valued. For example, the Head of the Startup Desk at MInT has a background in the ecosystem.<sup>25</sup>
  - **Skills:** Strong organizational, communication, and networking skills are essential. Program managers need to be adept at curriculum design and event management. Investment analysts require strong financial modeling and analytical skills.
- **For Startup Employees:** The competencies required depend on the specific role (e.g., software engineer, marketer, operations manager) but generally include adaptability, a proactive attitude, and the ability to thrive in a fast-paced, often

unstructured environment.<sup>43</sup>

## 7.4 Employment and Compensation Structure

- **Employment Types:** Roles for ecosystem professionals (e.g., program managers) are typically **permanent, full-time** positions with hubs or investment firms. For startup employees, early-stage ventures often offer a mix of salary and **equity/stock options** to compensate for lower cash salaries and to align incentives. **Freelance** and **consulting** arrangements are common for mentorship and specialized advisory roles.
- **Compensation:**
  - **Founders:** Compensation is typically tied to the success of the venture and the ability to raise capital. Early on, founder salaries are often minimal or non-existent.
  - **Ecosystem Professionals:** Salaries are competitive within the local non-profit and professional services market.
  - **Startup Employees:** Cash salaries may be lower than at established corporations, but the total compensation package can be significant if the company's equity becomes valuable.

## 7.5 Sub-Sector Growth Trajectory and Outlook

The Entrepreneurship and Startup Ecosystem sub-sector is set for explosive growth, driven directly by the new Startup Proclamation.<sup>4</sup> This legislation will formalize the sector, unlock new sources of funding (both public and private), and create a more predictable operating environment for entrepreneurs.

The growth of the ecosystem is also being fueled by:

- **Increased Investor Interest:** The growing activity of local angel networks and the entry of international VCs, particularly from Japan, are injecting much-needed capital and expertise into the system.<sup>23</sup>
- **Success Stories:** The emergence of startups that secure significant funding rounds (e.g., Dodai's \$4 million Series A)<sup>23</sup> or get accepted into prestigious



international accelerators (e.g., Better Auth joining Y Combinator) <sup>63</sup> creates a powerful demonstration effect, inspiring new entrepreneurs and attracting more investment.

- **Systematic Support:** Coordinated, multi-year support projects from partners like JICA and the Mastercard Foundation are building the long-term capacity of the ecosystem, ensuring a steady pipeline of well-supported startups.<sup>12</sup>

The outlook is one of rapid maturation. The key challenges will be ensuring the effective implementation of the Startup Proclamation, scaling up the "missing middle" funding, and developing a deep pool of experienced mentors and ecosystem managers to guide the next wave of Ethiopian entrepreneurs.

## Chapter 8: Educational Technology and Advanced Training

The Educational Technology (EdTech) and Advanced Training sub-sector is a critical component of the Platinum Economy, directly addressing the national priority of human capital development. It is a dynamic field characterized by innovative startups seeking to solve Ethiopia's unique educational challenges, supported by significant investment from international foundations and a policy environment that increasingly recognizes the role of technology in learning. This sub-sector is not only transforming how education is delivered but is also creating a new category of jobs in instructional design, learning analytics, and platform engineering.

### 8.1 Market Landscape and Key Employers

The EdTech landscape is dominated by a vibrant startup scene, with support from major development partners and a growing number of private training providers.

- **EdTech Startups:** A new generation of Ethiopian entrepreneurs is building solutions tailored to the local context. The **Mastercard Foundation EdTech Fellowship**, implemented by Reach for Change, provides a clear snapshot of the key players. The first and second cohorts include <sup>12</sup>:
  - **Whiz Kids:** Uses multimedia content (TV, radio, digital) for holistic child

development.

- **Qalam Education Platform:** Offers personalized online learning for Grade 12 students preparing for national exams.
- **Dynamo Centre for Technology:** Provides online educational tools for both urban and rural students.
- **Enechawet Games PLC:** Creates interactive educational books and mobile apps using Augmented Reality (AR) for young children.
- **Muyalogy:** A culturally responsive SaaS platform for online and offline learning.
- **Globe Dock:** Uses AI and data insights to personalize learning.
- **LIQ Tutors & A+ Online Tutors:** Platforms connecting students with tutors for various grade levels.
- **BeBlocky:** Teaches programming to children aged 5-15 through gamified lessons.
- **Mak-Addis Tutors:** An established online tutoring platform connecting students with tutors from around the globe, recognized with international awards.<sup>139</sup>
- **Advanced Training Providers:**
  - **Gebeya:** Through the **Safaricom Talent Cloud**, Gebeya offers sophisticated learning paths in high-demand tech fields like software development, cloud computing, cybersecurity, AI, and data science, specifically for Ethiopian talent.<sup>140</sup>
  - **International Online Platforms:** Providers like **Crossover**<sup>141</sup> and **Nucamp**<sup>62</sup> offer remote training and bootcamps, connecting Ethiopians with global-standard curricula in areas like AI and software development.
  - **Ardiland:** Provides free online courses in Amharic, with a focus on practical skills like cybersecurity and ethical hacking.<sup>142</sup>
- **Development Partners and Accelerators:** The **Mastercard Foundation** is a primary driver of the EdTech sector through its Fellowship program.<sup>12</sup> Implementing partners like **Reach for Change** are key employers of program managers and coaches who support these startups.<sup>12</sup>

## 8.2 Workforce Composition and Role Catalogue

The roles in this sub-sector require a unique blend of pedagogical knowledge, technical skill, and content expertise.

- **EdTech Product Development and Instructional Design:**

1. **Instructional Designer:** A role advertised by Gebeya, requiring a Bachelor's degree in instructional design and 3-5 years of experience in eLearning content development. The role involves applying principles of adult learning to create effective educational materials.<sup>143</sup>
2. **EdTech Product Manager:** Responsible for defining the vision, strategy, and roadmap for an EdTech product. This involves conducting user research, working with developers and designers, and ensuring the product meets learning objectives.
3. **Curriculum Developer for Emerging Fields:** Creates the educational content for advanced training programs. This involves designing courses, creating lesson plans, and developing assessments for topics like AI, data science, or cybersecurity, as seen in the offerings of the Safaricom Talent Cloud.<sup>140</sup>

- **Specialized Online Course Creation and Delivery:**

- **Online Course Creator / Content Writer:** Develops the specific content for online courses, which could be video scripts, written materials, or interactive exercises. A role for a Content Writer was advertised by Proximity Works for remote work.<sup>144</sup>
- **Virtual Tutor / Mentor:** Provides direct instruction and support to learners via online platforms. This is the core role at companies like Mak-Addis Tutors and LIQ Tutors.<sup>15</sup>
- **AI-Driven English/Language Arts Learning Strategist:** An advanced role advertised by Crossover, focused on using AI tools to personalize and scale language learning. Requires an advanced degree and experience applying technology to accelerate learning.<sup>141</sup>

- **Learning Analytics and Platform Engineering:**

1. **Learning Analytics Specialist:** Analyzes user data from learning platforms to understand learner behavior, measure the effectiveness of content, and provide insights for product improvement. The Globe Dock startup explicitly uses data insights to personalize learning.<sup>14</sup>
2. **EdTech Platform Engineer:** A software engineer who specializes in building and maintaining the technology infrastructure of a learning platform, which could be a Learning Management System (LMS), a mobile app, or a SaaS product.

- **Educational Program Management:**
  - **EdTech Fellowship Program Manager:** Manages the accelerator program for EdTech startups, a key role at an organization like Reach for Change.
  - **Director of Academics:** A senior leadership role, such as the one advertised by 2 Hour Learning via Crossover, responsible for leading academic teams, ensuring learning outcomes, and providing thought leadership in the EdTech space.<sup>141</sup>

### 8.3 Competency and Qualification Matrix

- **Formal Education:** For instructional design and curriculum development, a degree in **Instructional Design, Education, or a related field** is common.<sup>143</sup> For technical roles, a degree in **Computer Science or Software Engineering** is standard. For advanced roles like a Learning Strategist, a **Master's or PhD** in Learning Science or Educational Psychology is often required.<sup>141</sup>
- **Technical and Pedagogical Skills:**
  - **eLearning Content Development:** Expertise in creating engaging and effective online learning materials.<sup>143</sup>
  - **Adult Learning Principles:** A deep understanding of how adults learn is crucial for designing effective training programs.<sup>143</sup>
  - **Learning Management Systems (LMS):** Familiarity with building or using LMS platforms is a key technical skill. EdTech Hub ET specifically provides training for teachers on LMS use.<sup>15</sup>
  - **AI and Data Analysis:** For advanced roles, skills in AI, machine learning, and data analysis are needed to personalize learning and measure impact.<sup>14</sup>
  - **Gamification:** The ability to apply game mechanics to learning is a specialized skill, as demonstrated by BeBlocky's approach to teaching coding.<sup>15</sup>
- **Soft Skills:** Creativity, strong communication skills, and the ability to collaborate with diverse teams of educators, developers, and designers are essential.

### 8.4 Employment and Compensation Structure

- **Employment Types:** The sector includes **permanent, full-time** roles at established EdTech companies and training providers. **Contract-based** work is common for curriculum developers and content creators hired for specific course development projects. **Part-time** or **freelance** arrangements are the norm for virtual tutors. **Internships** are also available, providing an entry point into the industry.<sup>144</sup>
- **Compensation:** Salaries for EdTech professionals are competitive, particularly for those with a blend of technical and pedagogical skills. International remote positions offer significantly higher pay scales. For example, Crossover advertises a Director of Academics role at \$400,000/year and an AI-Driven Learning Strategist at \$100,000/year, accessible to global talent including Ethiopians.<sup>141</sup> This creates a strong incentive for local professionals to acquire high-demand, globally relevant EdTech skills.

## 8.5 Sub-Sector Growth Trajectory and Outlook

The EdTech sub-sector in Ethiopia is on a steep growth trajectory. The "Ethiopian EdTech Week 2025" event, which celebrated the first graduating cohort of the Mastercard Foundation Fellowship, highlights the growing vibrancy and visibility of the ecosystem.<sup>13</sup>

Key drivers of growth include:

- **High Demand for Education:** With a large and youthful population, there is immense demand for accessible and quality education at all levels, from K-12 to vocational and professional training.<sup>12</sup>
- **Addressing Systemic Challenges:** EdTech startups are directly addressing critical gaps in the traditional education system, such as high failure rates in national exams (Qalam), the digital skills gap (Koderlab), and the need for specialized vocational training (Muya Space).<sup>14</sup>
- **Significant Donor Investment:** The substantial and multi-year commitment from the Mastercard Foundation provides a stable source of funding, mentorship, and support that is crucial for nurturing the sector.<sup>12</sup>
- **Expanding Connectivity:** As mobile internet penetration grows, the potential

market for digital learning solutions expands, though infrastructure limitations remain a challenge.<sup>14</sup>

The outlook is highly positive. The success of the first cohorts of the EdTech Fellowship is likely to attract more investment and talent to the sector. The increasing need for upskilling and reskilling the workforce for the broader Platinum Economy will create a sustained demand for advanced training providers. The main challenge will be ensuring that EdTech solutions are inclusive and can reach learners in underserved and rural communities, bridging the digital divide rather than widening it.

## Chapter 9: Intellectual Property and Legal Expertise

The Intellectual Property (IP) and Legal Expertise sub-sector is a cornerstone of the Platinum Economy, providing the essential legal framework that protects innovation, secures investments, and enables the commercialization of knowledge-based assets. As Ethiopia's economy modernizes and integrates globally, the demand for sophisticated legal services related to technology, data, and intellectual property is rapidly increasing. This sub-sector is characterized by a growing number of specialized law firms and a push toward aligning national laws with international standards.

### 9.1 Market Landscape and Key Employers

The market for specialized legal services is concentrated in Addis Ababa and is composed of several forward-thinking law firms that have developed practices in technology and IP law.

- **Specialized Law Firms:**

1. **Aman & Partners LLP:** A pioneering firm in IP and technology law in Ethiopia. The firm's managing partner, Aman Assefa, has been instrumental in the development of Ethiopia's IP legal framework. The firm provides a full suite of services, from IP registration and licensing to litigation and enforcement.<sup>145</sup>
2. **5A Law Firm LLP:** This firm has a dedicated practice for the technology and

digital transformation sectors. They advise tech companies and startups on IT contracts, SaaS licensing, data privacy, cybersecurity, and regulatory compliance. The firm has also been involved in drafting key legislation, including the Computer Crime Proclamation.<sup>146</sup>

3. **DABLO Law Firm:** A firm with extensive expertise in corporate and commercial law that also caters to flourishing areas like fintech and information technology, serving clients from nimble tech startups to multinational corporations.<sup>147</sup>
  4. **Fikadu Asfaw & Associates (FALO):** An IP law firm in Addis Ababa offering comprehensive services covering the acquisition, exploitation, enforcement, and transfer of IP rights across various industries, including telecom and manufacturing.<sup>148</sup>
  5. **Other Notable Firms:** The landscape also includes firms like **Getnet Yawkal Law Office**, **Alebel Ashagrie & Associates Law Office**, and **Samuel Mekonnen Law Office**, which offer services in corporate, commercial, and intellectual property law.<sup>148</sup>
- **Government and Regulatory Bodies:**
    - **Ethiopian Intellectual Property Authority (EIPA):** This is the primary government body responsible for the administration and protection of IP rights in Ethiopia. It manages the registration of patents, trademarks, and copyrights, and works to combat infringement.<sup>7</sup> EIPA is a key employer of IP examiners and legal experts.
    - **Ministry of Innovation and Technology (MInT):** MInT is involved in shaping the policy and regulatory environment for technology, including data protection and cybersecurity, which creates a need for in-house legal expertise.<sup>64</sup>
  - **In-House Counsel:** As technology companies, financial institutions, and other large corporations grow, they are increasingly hiring in-house legal counsel to manage their IP portfolios, negotiate technology agreements, and ensure regulatory compliance.

## 9.2 Workforce Composition and Role Catalogue

The roles in this sub-sector require deep legal knowledge combined with an understanding of technology and business.



## 1. **Patent and Intellectual Property Legal Services:**

- **IP Lawyer / Attorney:** The core professional role. Responsibilities include advising clients on IP strategy, filing and prosecuting patent, trademark, and copyright applications, drafting licensing agreements, and representing clients in infringement litigation. This is the primary role at firms like Aman & Partners and FALO.<sup>145</sup>
- **Trademark Agent:** A licensed professional, such as a partner at 5A Law Firm, who specializes in the process of registering and maintaining trademarks with EIPA.<sup>146</sup>
- **IP Examiner:** A role within EIPA responsible for reviewing patent and trademark applications to ensure they meet the legal requirements for registration.

## 2. **Technology and Data Privacy Law:**

- **Technology Lawyer:** A specialist who advises on legal issues specific to the tech sector. This includes drafting and negotiating IT contracts, software development agreements, and SaaS licensing agreements. This is a key service offered by 5A Law Firm.<sup>146</sup>
- **Data Privacy / Cybersecurity Lawyer:** Advises clients on compliance with data protection laws (such as Ethiopia's Personal Data Protection Proclamation <sup>150</sup>), developing privacy policies, and responding to data breaches. This is an area of growing importance and a focus for firms like 5A Law Firm.<sup>146</sup>

## 3. **Regulatory Affairs and Legal Consulting for Startups:**

1. **Regulatory Affairs Specialist (Emerging Tech):** Advises companies, particularly in fintech and telecom, on navigating the regulatory landscape, including participating in regulatory sandboxes as provided for in the new Startup Proclamation.<sup>4</sup>
2. **Legal Consultant for Startups:** Provides comprehensive legal support to startups, from company incorporation and founder agreements to fundraising documentation and IP protection. This is a service offered by many of the specialized firms.<sup>10</sup>

## 4. **Contract Negotiation for Technology Agreements:**

- **Contracts Lawyer / Manager:** Specializes in drafting, reviewing, and negotiating a wide range of technology-related agreements, including technology transfer agreements, joint venture agreements, and service level agreements (SLAs). Aman & Partners offers expertise in technology transfer agreements and royalty arrangements.<sup>145</sup>

### 9.3 Competency and Qualification Matrix

2. **Formal Education:** A **Bachelor of Laws (LLB)** degree is the minimum requirement. An **LLM (Master of Laws)**, particularly with a specialization in Intellectual Property or Technology Law, is highly advantageous. Lawyers must be licensed to practice in Ethiopia.
3. **Technical and Domain-Specific Skills:**
  - **Deep Legal Knowledge:** Expertise in Ethiopian IP law (trademarks, patents, copyright), contract law, and corporate law is fundamental.
  - **Understanding of Technology:** A strong grasp of technology concepts is essential to effectively advise clients. This includes understanding software development, cloud computing, blockchain, and AI to a degree that allows for meaningful legal analysis.
  - **Regulatory Knowledge:** In-depth knowledge of the regulations governing key sectors like banking, telecom, and data protection is critical.
  - **International Law:** Familiarity with international IP treaties like the Paris Convention and the Madrid Protocol is becoming increasingly important as Ethiopia integrates into the global economy.<sup>8</sup>
4. **Analytical Capabilities:** Strong legal research, analytical reasoning, and the ability to apply complex legal principles to novel technological situations are core competencies.
5. **Soft Skills:** Excellent negotiation, drafting, and communication skills are paramount. The ability to provide clear, commercially-minded advice to business clients is a key differentiator.

### 9.4 Employment and Compensation Structure

6. **Employment Types:** The most common arrangement is **permanent employment** as an associate or partner in a law firm. **In-house counsel** roles are also permanent positions. **Consulting** or **contract-based** work is possible for highly specialized experts brought in for specific matters. Remote legal work is also emerging, with platforms listing roles like "Graduate Legal Counsel - Tech Sector" accessible to Ethiopian talent.<sup>151</sup>

7. **Compensation:** Legal professionals in this specialized, high-value sub-sector command some of the highest salaries in the professional services industry in Ethiopia. Compensation is commensurate with experience, specialization, and the prestige of the employing firm.

## 9.5 Sub-Sector Growth Trajectory and Outlook

The growth of the IP and Legal Expertise sub-sector is inextricably linked to the growth of the entire Platinum Economy. As innovation flourishes, the need to protect it grows in lockstep. The outlook is extremely positive, driven by several key trends:

5. **Policy and Legislative Changes:** The new Startup Proclamation, the Personal Data Protection Proclamation, and Ethiopia's accession to international IP treaties are creating a more complex and regulated environment, which in turn drives demand for expert legal advice.<sup>4</sup>
6. **Increased Investment:** As more local and international investment flows into Ethiopia's tech and creative sectors, there will be a corresponding increase in demand for legal services related to due diligence, M&A, and investment agreements.
7. **Technological Advancement:** The adoption of new technologies like AI and blockchain will create novel legal questions around liability, data ownership, and governance, requiring a new generation of legally and technically fluent lawyers.
8. **Formalization of the Economy:** The overall shift from an informal to a formal economy necessitates a greater reliance on formal contracts and legal protections, further boosting demand for legal services.

The primary challenge for this sub-sector will be developing a sufficiently large pool of lawyers who possess the dual expertise in both law and technology required to serve this rapidly evolving market.

## Chapter 10: Investment Management for Innovation

The Investment Management for Innovation sub-sector is the financial engine of the

Platinum Economy, providing the risk capital that fuels the growth of startups and high-potential enterprises. This sub-sector, while still nascent compared to more mature markets, is becoming increasingly structured and sophisticated. It comprises a mix of local angel networks, private equity and venture capital funds, and development finance institutions, all focused on identifying and capitalizing on the most promising opportunities in Ethiopia's innovation landscape.

## 10.1 Market Landscape and Key Employers

The key employers in this sub-sector are the firms and networks that deploy capital into innovative ventures.

### 1. Private Equity and Venture Capital Firms:

1. **Cepheus Growth Capital:** A private equity firm focused on providing long-term growth capital to Ethiopian companies seeking to scale up and modernize. They typically take significant minority positions and focus on sectors like manufacturing, agro-processing, and services. The EIB has committed \$10 million to their SME fund.<sup>18</sup>
2. **Zoscales Partners:** An award-winning private equity fund manager with offices in Addis Ababa and Nairobi. They operate an SME Growth Fund and have a focus on businesses that generate positive social and environmental impact.<sup>20</sup>
3. **Schulze Global Investments (SGI):** Manages the Ethiopia Growth and Transformation Fund, the country's first private equity SME fund, which was launched in 2012. The fund invests in sectors like agri-processing, manufacturing, education, and healthcare, with notable investments in companies like Family Milk and National Cement.<sup>22</sup>
4. **Renew Capital:** A venture capital firm that invests in seed-stage companies in sectors like fintech, food and beverage, and foodtech.<sup>21</sup>
5. **Kazana Fund:** A VC fund focused on pre-seed and seed-stage technology companies in Africa, with a presence in Ethiopia.<sup>21</sup>

### 2. Angel Investment Networks:

1. **Addis Ababa Angels (AAA):** A prominent group of individual investors who pool their capital and expertise to back early-stage, tech-enabled startups in Ethiopia. They provide not just funding but also crucial mentorship and

network access.<sup>17</sup>

### 3. **Corporate and Strategic Investors:**

1. **Inclusion Japan (ICJ):** A Tokyo-based VC firm that has become a significant investor in the Ethiopian startup scene, backing companies like **Dodai** (e-mobility), **Addis Software**, and **Gebeya**.<sup>23</sup>
2. **Nissay Capital:** The corporate venture arm of a major Japanese insurance and asset management firm, which made its first African investment in Dodai.<sup>23</sup>

### 4. **Development Finance Institutions (DFIs):**

1. **British International Investment (BII)** (formerly CDC Group): A key investor in the Schulze Global Ethiopia fund, committing \$15 million to provide growth capital to SMEs.<sup>22</sup>
2. **European Investment Bank (EIB):** Has committed capital to the Cepheus Ethiopia SME Fund, demonstrating DFI support for local fund managers.<sup>19</sup>

## 10.2 Workforce Composition and Role Catalogue

The roles in this sub-sector are focused on the sourcing, analysis, execution, and management of investments.

### 5. **Investment Analysis and Execution:**

1. **Investment Analyst / Associate:** The core analytical role at a VC or PE firm. Responsibilities include market research, deal sourcing, conducting due diligence on potential investments, building financial models for valuation, and preparing investment memorandums for the investment committee.
2. **Venture Capital / Private Equity Partner:** A senior role responsible for leading the investment process, making final investment decisions, taking board seats at portfolio companies, and managing the fund's strategy and fundraising efforts. The leadership at firms like Cepheus and Zoscales exemplify this role.<sup>19</sup>

### 6. **Portfolio Operations and Support:**

1. **Portfolio Operations Support / Manager:** Works directly with the companies a fund has invested in (portfolio companies) to help them grow and succeed. This can involve providing strategic advice, helping with recruitment, improving financial management, and preparing the company for

a future exit (e.g., sale or IPO).

2. **Board Member:** Partners from investment firms often take seats on the boards of their portfolio companies to provide governance and strategic oversight.<sup>22</sup>

#### 7. **Impact Investment Specialization:**

1. **Impact Investment Analyst/Manager:** A role focused on investments that aim to generate both a financial return and a positive, measurable social or environmental impact. This requires the ability to assess and measure non-financial outcomes alongside traditional financial metrics. This is central to the strategy of firms like Zoscales Partners.<sup>20</sup> The growing presence of impact investors in African VC deals (involved in 34% of deals in 2024) suggests increasing demand for this specialization.<sup>152</sup>

#### 8. **Financial Modeling and Valuation:**

1. **Financial Modeler / Valuation Specialist:** A specialized role focused on creating complex financial models to value startups and technology projects, forecast performance, and analyze potential returns on investment. This is a critical function in all investment decisions.

### 10.3 Competency and Qualification Matrix

1. **Formal Education:** A strong academic background in **Finance, Economics, or Business Administration** is standard. An **MBA** or a professional designation like the **Chartered Financial Analyst (CFA)** charter is highly valued and often required for senior roles.
2. **Technical and Analytical Skills:**
  1. **Financial Modeling and Valuation:** Expert-level proficiency in financial modeling (DCF, LBO, comparables analysis) and valuation techniques is the most critical technical skill.
  2. **Data Analysis:** The ability to analyze market data, company performance metrics, and economic trends to inform investment decisions.
  3. **Due Diligence:** A systematic and detail-oriented approach to investigating all aspects of a potential investment, including its financials, operations, market, and team.
  4. **Legal and Structuring:** An understanding of term sheets, shareholder agreements, and the legal aspects of deal structuring.

3. **Strategic and Commercial Acumen:** The ability to assess a business model's viability, understand competitive dynamics, and identify scalable growth opportunities is essential.
4. **Soft Skills:** Strong networking skills for deal sourcing, excellent communication and persuasion skills for interacting with founders and investment committees, and strong relationship management skills for working with portfolio companies.

#### 10.4 Employment and Compensation Structure

5. **Employment Types:** Roles within investment firms are almost exclusively **permanent, full-time** positions.
6. **Compensation:** Compensation in investment management is among the highest of any profession and is typically composed of two parts:
  1. **Base Salary:** A competitive annual salary.
  2. Carried Interest ("Carry"): A share of the profits from the fund's investments. This is the primary long-term incentive for investment professionals and can result in very significant wealth creation if the fund performs well. This high-reward structure is designed to attract top talent and align the interests of the fund managers with their investors (Limited Partners).

#### 10.5 Sub-Sector Growth Trajectory and Outlook

The investment management sub-sector in Ethiopia is at an early but crucial stage of development. Its growth is a direct indicator of the health and potential of the broader innovation ecosystem.

Key growth drivers include:

7. **Maturing Startup Ecosystem:** As more high-quality startups emerge from hubs and accelerators, they create a larger and more attractive pool of potential investments for VCs and PE firms.
8. **Policy De-risking:** The Startup Proclamation and IP reforms make Ethiopia a more predictable and attractive market for investors, both local and foreign.<sup>4</sup>
9. **Increased International Interest:** The active participation of Japanese VCs and



global DFIs demonstrates growing international confidence in the market's potential.<sup>19</sup>

10. **Local Capital Formation:** The establishment of local funds like Cepheus and networks like Addis Ababa Angels is a critical step in building a self-sustaining domestic investment ecosystem.<sup>17</sup>

The overall venture capital activity in Africa experienced a downturn in 2024, reflecting global trends, with a 28% decline in deal value.<sup>153</sup> However, the median deal size in Africa rose, and late-stage African companies secured funding rounds that were competitive on a global scale.<sup>153</sup> This suggests a "flight to quality," where investors are making fewer but larger bets on the most promising companies.

The outlook for the Ethiopian investment management sub-sector is one of gradual but steady growth. It will likely continue to be dominated by "patient capital" from DFIs and impact-focused investors in the medium term, who are better equipped to navigate the country's macroeconomic and regulatory challenges.<sup>152</sup> The key to accelerating growth will be the emergence of more local fund managers and more successful exits, which will provide the proof points needed to attract a broader base of purely commercial international capital.

## Chapter 11: Advanced Creative Technology and Media

This sub-sector exists at the intersection of creativity and deep technology. It moves beyond traditional media production into the realm of interactive, immersive, and computationally intensive creative work. While still a niche area in Ethiopia, there are clear signs of emerging capabilities in game development, augmented reality, and the creation of advanced digital tools, driven by a small but highly skilled group of developers and designers.

### 11.1 Market Landscape and Key Employers

The employers in this space are typically small, specialized studios and the technical

departments of larger media or technology companies.

#### 11. **Game Development Studios:**

1. **Qene Games:** An award-winning mobile game development studio based in Addis Ababa. They have successfully launched games like *Kukulu* (winner of the Apps Africa Award for Best Entertainment Solution in 2018) and *Gebeta* (winner of the Apps Africa Best App of the Year in 2020). Qene Games is a clear leader in the Ethiopian interactive entertainment space.<sup>127</sup>
2. **Enechawet Games PLC:** An EdTech startup that develops interactive educational books and a mobile app using Augmented Reality (AR) for children. This demonstrates the application of game development and AR technology in the education sector.<sup>13</sup>

#### 12. **Software Development Companies (with media tool focus):**

1. While not their sole focus, larger software companies may develop tools for the media industry. For example, a firm might create a custom Content Management System (CMS) or a digital asset management tool for a media client. Addis Software has developed websites and CMS for clients like Yegna Home.<sup>154</sup>

#### 13. **Creative Agencies with Technical Capabilities:**

1. Agencies that offer interactive or digital-first campaigns may employ developers to create microsites, interactive installations, or AR/VR experiences.

#### 14. **Freelance and Remote Developers:** A significant portion of the work in this highly specialized field is likely done by freelance developers and designers, or by Ethiopian talent working remotely for international gaming or media tech companies.

### 11.2 Workforce Composition and Role Catalogue

The roles in this sub-sector are highly technical and require a combination of programming skill and artistic sensibility.

#### 1. **Software Development for Digital Media Tools:**

1. **Media Tool Developer:** A software engineer who builds the tools that other creatives use. This could include developing plugins for editing software, creating custom animation rigs, or building digital asset management

systems.

2. **Augmented and Virtual Reality (AR/VR) Development:**

1. **AR/VR Developer:** Specializes in creating immersive and interactive experiences using platforms like Unity or Unreal Engine. The work of Enechawet Games in creating AR educational books is a direct example of this role in the Ethiopian context.<sup>14</sup>

3. **Game Development and 3D Design:**

1. **Game Developer:** A programmer who writes the code for games. This can involve working on game mechanics, physics, AI, and networking. This is the core technical role at a studio like Qene Games.<sup>127</sup>
2. **3D Artist / Designer:** Creates the 3D models, environments, and characters for games and other immersive experiences.
3. **Game Designer:** Focuses on the conceptual side of game development, designing the rules, story, and overall player experience.

4. **Interactive Installation Creation:**

1. **Creative Technologist:** A hybrid role that combines coding, electronics (e.g., Arduino, Raspberry Pi), and physical design to create interactive installations for events, museums, or public spaces.

5. **Advanced Audio Engineering for Immersive Experiences:**

1. **Spatial Audio Engineer:** A sound engineer who specializes in creating 3D audio experiences for VR, AR, and games, making the soundscape feel realistic and immersive.

### 11.3 Competency and Qualification Matrix

6. **Formal Education:** A degree in **Computer Science, Software Engineering, or a related field** is the most common background for developers in this space. A degree in **Fine Arts, Graphic Design, or Animation** is typical for artists and designers.

7. **Technical Skills:**

1. **Game Engines:** High proficiency in game engines like **Unity** (which uses C#) or **Unreal Engine** (which uses C++) is the most critical skill for game and AR/VR development.
2. **Programming Languages:** Strong skills in **C#** or **C++** are essential for game development. Knowledge of **Python** is also useful for scripting and tool

development.

3. **3D Modeling Software:** Proficiency in tools like **Blender, Maya, or 3ds Max** is required for 3D artists.
4. **Graphics Programming:** Knowledge of graphics APIs like OpenGL or DirectX and shader languages (e.g., HLSL, GLSL) is necessary for more advanced graphics development.
5. **AR/VR SDKs:** Familiarity with specific software development kits for AR (e.g., ARKit, ARCore) and VR (e.g., Oculus SDK, OpenVR) is required for those platforms.
8. **Creative and Analytical Capabilities:**
  1. **Problem-Solving:** The ability to solve complex technical and design challenges is crucial.
  2. **Artistic Sensibility:** Even for technical roles, an understanding of visual design, animation principles, and user experience is important.
  3. **Mathematical Skills:** A strong foundation in mathematics, particularly linear algebra and physics, is necessary for game and graphics programming.
9. **Soft Skills:** This is a highly collaborative field, so strong teamwork and communication skills are essential. A passion for games and interactive media is also a key motivator.

#### 11.4 Employment and Compensation Structure

10. **Employment Types: Permanent, full-time** roles exist at the few established studios like Qene Games. However, the global game industry relies heavily on **contract-based** and **freelance** talent, and this is likely to be a significant model in Ethiopia as well. **Remote work** for international studios is a major opportunity for top-tier talent.
11. **Compensation:** Given the high level of technical skill required, salaries for experienced game developers and AR/VR specialists are at the upper end of the software development market. Remote roles for international companies would offer global-rate salaries, creating a significant income potential for skilled Ethiopian developers.

#### 11.5 Sub-Sector Growth Trajectory and Outlook

The Advanced Creative Technology sub-sector is in its infancy in Ethiopia but shows significant potential for growth.

Key drivers include:

1. **Global Market Growth:** The global video game and immersive media markets are massive and continue to grow, creating a large potential export market for Ethiopian studios.
2. **Local Success Stories:** The awards and recognition received by Qene Games demonstrate that it is possible to create globally competitive creative technology products from Ethiopia.<sup>127</sup> This success serves as an inspiration and a proof of concept for other entrepreneurs and investors.
3. **Application in Other Sectors:** The use of AR and gamification in the EdTech sector by startups like Enechawet Games shows that the skills from this sub-sector have applications beyond pure entertainment, creating additional market opportunities.<sup>14</sup>
4. **Youthful Demographics:** Ethiopia's large and young population represents a significant potential domestic market for games and interactive entertainment.

The outlook is one of high-potential, niche growth. The sector will likely grow through a combination of small, independent studios targeting both local and global markets, and an increasing number of Ethiopian developers working remotely for major international companies. The key challenges will be access to specialized training in areas like game design and 3D art, and access to the risk capital needed to fund the long and expensive development cycles of high-quality games and immersive experiences.

## Chapter 12: Health and Biotechnology Innovation

The Health and Biotechnology Innovation sub-sector is a critical area of the Platinum Economy, directly addressing some of Ethiopia's most pressing national challenges in public health and agricultural productivity. This field is characterized by advanced scientific research conducted at national institutes, the application of computational methods to biological data, and the development of digital health solutions to

improve service delivery. It is a sector where deep scientific expertise and cutting-edge technology converge.

## 12.1 Market Landscape and Key Employers

The key players in this sub-sector are a mix of public research institutions, universities, and a nascent group of digital health startups.

### 5. National Research Institutes:

1. **Bio and Emerging Technology Institute (BETin):** This is the central institution for biotechnology research. Its **Health Biotechnology Directorate** focuses on vaccine development, pharmaceutical technology, and diagnostic development. It has collaborated with the National Veterinary Institute (NVI) on a fowl cholera vaccine and is currently working on developing LAMP assay test kits for COVID-19 diagnostics.<sup>68</sup>
2. **Ethiopian Public Health Institute (EPHI):** EPHI is the leading public health research body, with directorates focusing on infectious diseases, nutrition, non-communicable diseases, and malaria. It plays a key role in disease surveillance and providing referral medical laboratory services.<sup>71</sup>
3. **Armauer Hansen Research Institute (AHRI):** While not detailed in the snippets, AHRI is a well-known biomedical research institute in Ethiopia, collaborating with other institutions on health research.

### 6. University Research Centers:

1. Major universities like **Addis Ababa University (AAU)**, **University of Gondar** (which began as a Public Health College)<sup>79</sup>, and **Jimma University** have strong programs in health sciences, medicine, and biotechnology, serving as hubs for academic research and training. AAU's research output includes PhD work on deep learning for heart disease classification using ECG signals.<sup>89</sup>

### 7. Digital Health and Health AI Companies:

1. While the startup scene in this specific area is less documented in the provided materials than in fintech or EdTech, the application of AI to healthcare is a clear area of focus. The **Ethiopian Artificial Intelligence Institute (EAI)** lists "Disease Prediction, Detection and Management" as one of its key projects.<sup>66</sup> Its publications include research on using deep learning

for cancer image analysis and classifying heart disease.<sup>155</sup> This indicates a strong R&D foundation for future digital health startups.

#### 8. **International Development Partners:**

1. Organizations like **USAID** have historically been major funders of Ethiopia's health sector, supporting programs to combat HIV and malaria and to strengthen the overall health system, including leveraging technology for reliable health data.<sup>84</sup>

## 12.2 Workforce Composition and Role Catalogue

The roles in this sub-sector are highly specialized and require advanced scientific and technical training.

#### 1. **Bioinformatics and Computational Biology:**

1. **Bioinformatician / Computational Biologist:** This role involves using computational tools to analyze large biological datasets, such as genomic or proteomic data. Researchers at BETin working on the genetic diversity of crops or at EAll developing AI models for disease prediction would fall into this category. BETin's Genomics and Bioinformatics directorate is dedicated to this field.<sup>68</sup>

#### 2. **Digital Health Technology Development:**

1. **Digital Health Specialist:** A role focused on designing and implementing digital tools for the health sector. The World Bank, for instance, has advertised for a Digital Development Specialist who would work on strategies for digital service delivery, which includes e-health.<sup>83</sup>
2. **Health Information Systems (HIS) Developer:** A software engineer who specializes in creating and maintaining health information systems, such as electronic health records (EHRs) or disease surveillance platforms. MERQ Consultancy develops such systems and dashboards.<sup>108</sup>

#### 3. **Medical Device Research and Development:**

1. **Biomedical Engineer:** A role that applies engineering principles to medicine and biology. Job ads for academic positions at Ethiopian universities include openings for PhD-level experts in Bio-Instrumentation and Bio-Medical Engineering, tasked with teaching and research.<sup>88</sup>

#### 4. **Health Artificial Intelligence Applications:**



1. **Health AI Researcher:** A scientist or engineer who develops and applies AI and machine learning models to solve health problems. Researchers at EAll and AAU are actively publishing in this area, with work on using deep learning for heart disease classification, skin lesion classification, and brain tumor segmentation.<sup>89</sup> This is a core research role at the frontier of health innovation.
5. **Clinical Research Project Management:**
  1. **Clinical Research Coordinator / Manager:** Manages the operational aspects of clinical trials and other health research studies. This involves patient recruitment, data collection, regulatory compliance, and budget management. This is a key function within EPHI and university medical centers.

### 12.3 Competency and Qualification Matrix

1. **Formal Education:** An **advanced degree (MSc or PhD)** in a relevant field is typically required for research and development roles. This could be in **Biotechnology, Molecular Biology, Genetics, Computer Science, Bioinformatics, or Biomedical Engineering**.<sup>88</sup> Medical doctors (MDs) with additional research training also play a key role.
2. **Technical and Scientific Skills:**
  1. **Laboratory Techniques:** For wet-lab roles, expertise in techniques like PCR, DNA sequencing, cell culture, and protein analysis is essential.
  2. **Computational Skills:** For computational roles, strong programming skills in **Python** or **R** are required, along with experience with bioinformatics software and libraries.
  3. **AI/Machine Learning:** For Health AI roles, deep knowledge of machine learning algorithms, deep learning frameworks (**TensorFlow, PyTorch**), and experience with medical imaging or signal processing is necessary.<sup>89</sup>
  4. **Data Management:** Skills in database management and handling large, complex datasets are crucial for bioinformatics and digital health roles.
3. **Analytical Capabilities:** The ability to design experiments, critically analyze data, and interpret complex biological and clinical information is fundamental. A track record of publishing in peer-reviewed scientific journals is a key indicator of competence for researchers.

4. **Soft Skills:** Strong collaboration skills are needed to work in interdisciplinary teams of scientists, clinicians, and engineers. Ethical considerations are also paramount, especially when dealing with patient data and clinical research.

## 12.4 Employment and Compensation Structure

5. **Employment Types:** The majority of roles are **permanent, full-time** positions within government research institutes and universities. **Contract-based** positions are common for researchers working on specific grant-funded projects. **Postdoctoral fellowships** are also a key part of the academic career path.
6. **Compensation:** Salaries for public sector researchers are based on government scales and are generally modest. However, researchers can often supplement their income through consulting work or by securing international research grants, which may come with higher stipends. Roles with international organizations or in the private digital health sector would command higher salaries.

## 12.5 Sub-Sector Growth Trajectory and Outlook

The Health and Biotechnology Innovation sub-sector is poised for steady growth, driven by urgent national needs and increasing technological capacity.

Key growth drivers include:

7. **National Health Priorities:** The high burden of both infectious and non-communicable diseases creates a strong, persistent demand for innovative diagnostic, therapeutic, and preventative solutions.
8. **Government Investment in R&D:** The establishment and continued support for specialized institutes like BETin and EAll signal a clear government commitment to building national capacity in these strategic fields.<sup>66</sup>
9. **Convergence with AI:** The rapid advancements in AI and machine learning are creating powerful new tools for drug discovery, diagnostics, and personalized medicine. Ethiopia's investment in AI research, as seen at EAll, positions it to be a participant in this global revolution.<sup>150</sup>

10. **Focus on Agricultural Biotechnology:** BETin's work on crop improvement (e.g., developing drought-tolerant or disease-resistant varieties) is critical for Ethiopia's food security and economic development, ensuring continued support for this area of research.<sup>67</sup>

The outlook is one of strategic, long-term development. Unlike the fast-moving software sector, biotechnology has long research and development cycles and requires significant, sustained capital investment in laboratories and equipment. Growth will be dependent on continued government funding, the ability to attract international research grants and collaborations, and the capacity to translate research findings from the lab into commercially viable products and improved public health outcomes.

## Chapter 13: Environmental and Climate Technology Innovation

The Environmental and Climate Technology (Climate Tech) sub-sector is an emerging but increasingly vital part of Ethiopia's Platinum Economy. Driven by the country's vulnerability to climate change and its vast renewable energy potential, this sector focuses on applying advanced technology and data science to address environmental challenges and build a sustainable, green economy. It is a field where scientific research, engineering, and data analysis intersect to create solutions for climate adaptation and mitigation.

### 13.1 Market Landscape and Key Employers

The key actors in this sub-sector include government agencies responsible for energy and environment, university research groups, and projects funded by international development partners.

1. **Government and Public Utilities:**

1. **Ethiopian Electric Power (EEP):** As the state-owned utility, EEP is the primary developer of large-scale renewable energy projects. It is responsible for major hydropower projects like the **Grand Ethiopian Renaissance Dam**

(GERD) and the **Koysha Hydropower Dam**, as well as wind farms like **Aysha Wind Farm 2** and the **Asella Wind Power Plant**.<sup>114</sup>

2. **Ministry of Water and Energy / Public-Private Partnership (PPP)**

**Directorate:** This government body is responsible for policy and for procuring new energy projects. It has recently issued a Request for Qualification (RFQ) for two major solar PV projects, **GAD II (125 MW)** and **Weranso (100 MW)**, structured as Build-Operate-Transfer (BOT) concessions.<sup>157</sup>

2. **University Research Centers:**

1. Universities with strong engineering and environmental science programs are hubs for research in this area. **Addis Ababa Science and Technology University (AASTU)**, for example, lists "Renewable energy (small wind turbine)" as one of its student technology transfer projects.<sup>6</sup>

3. **Private Sector and Startups:**

1. **Kubik:** A notable startup in the circular economy space, Kubik produces low-carbon building materials from plastic waste, demonstrating a market-based solution to environmental problems.<sup>158</sup>
2. **International and Local Engineering Firms:** The development of large-scale energy projects involves numerous engineering, procurement, and construction (EPC) contractors, as well as consulting firms that provide technical and environmental assessment services.

4. **International Development Partners:**

1. The **World Bank** is a key partner, supporting initiatives like the tendering of 20 Solar Mini-Grid Projects in 2023 to power rural communities.<sup>157</sup>
2. **Japan International Cooperation Agency (JICA):** JICA's development cooperation in Ethiopia includes a priority area for infrastructure, which encompasses a "Stable Power Supply Program" focused on geothermal energy development and improving the transmission and distribution network.<sup>87</sup>

## 13.2 Workforce Composition and Role Catalogue

The roles in this sub-sector are highly technical and require a blend of engineering, environmental science, and data analysis skills.

### 1. **Climate Data Science and Modeling:**

1. **Climate Data Scientist:** This role involves analyzing large climate datasets to model climate change impacts, forecast weather patterns, and inform adaptation strategies. Researchers working on projects that combine satellite data with on-the-ground ecological data to control invasive species, as described in one project in Ethiopia, would perform this function.<sup>159</sup>
2. **Hydrological Modeler:** A specialist who models water resources, critical for managing Ethiopia's vast hydropower assets and for planning irrigation and water supply projects in the face of changing rainfall patterns.

### 2. **Renewable Energy Research and Development:**

1. **Renewable Energy Engineer/Researcher:** Works on developing and improving renewable energy technologies beyond standard implementations. This could involve research into more efficient solar panels, advanced wind turbine designs, or, as supported by JICA, **geothermal energy exploration and development**.<sup>87</sup>
2. **Solar PV Project Development Manager:** Manages the entire lifecycle of a solar power plant project, from site selection and feasibility studies to procurement, construction, and operation. This role is central to the new GAD II and Weranso projects.<sup>157</sup>
3. **Wind Energy Engineer:** Specializes in the design, analysis, and operation of wind farms like Aysha and Asella.<sup>156</sup>

### 3. **Circular Economy Technology Design:**

1. **Materials Scientist / Chemical Engineer:** A role focused on developing new materials and processes for the circular economy. The team at **Kubik**, which transforms plastic waste into building materials, exemplifies this function.<sup>158</sup> This requires expertise in polymer chemistry and material engineering.

### 4. **Environmental Monitoring Technology Development:**

1. **Geospatial Analyst / Remote Sensing Specialist:** Uses satellite imagery and GIS technology to monitor environmental changes, such as deforestation, land degradation, or water body dynamics. The **Space Science and Geospatial Institute (SSGI)**, with its new high-resolution satellite ground stations, is the key national institution for this work.<sup>69</sup>
2. **Environmental Sensor Engineer:** Designs and deploys sensor networks to monitor environmental parameters like air and water quality in real-time.

## 13.3 Competency and Qualification Matrix

1. **Formal Education:** A degree in an engineering discipline (**Electrical, Mechanical, Civil, Chemical**) or a natural science (**Environmental Science, Physics, Geology**) is standard. An **MSc or PhD** is typically required for research and advanced modeling roles.
2. **Technical and Domain-Specific Skills:**
  1. **Energy Systems Knowledge:** Deep understanding of the principles of hydropower, solar PV, wind, or geothermal energy systems.
  2. **Data Analysis and Modeling:** Proficiency in programming languages like **Python** or **R** for data analysis, and experience with specialized modeling software for climate (e.g., GCMs), hydrology (e.g., HEC-RAS), or energy systems (e.g., PVSyst, HOMER).
  3. **Geospatial Skills:** Expertise in **GIS software (e.g., ArcGIS, QGIS)** and remote sensing techniques is crucial for environmental monitoring and resource mapping.<sup>84</sup>
  4. **Materials Science:** For circular economy roles, knowledge of polymer science, chemical processing, and materials testing is required.
  5. **Project Management:** Skills in managing large, complex infrastructure projects are essential for roles in the energy sector.
3. **Analytical Capabilities:** The ability to analyze complex environmental and engineering systems, interpret large datasets, and develop evidence-based solutions is paramount.
4. **Soft Skills:** Strong project management, communication, and collaboration skills are needed to work with diverse teams of engineers, scientists, policymakers, and community stakeholders.

### 13.4 Employment and Compensation Structure

1. **Employment Types:** **Permanent, full-time** positions are common within government utilities like EEP and regulatory bodies. **Contract-based** roles are prevalent for experts working on specific, time-bound infrastructure projects or internationally funded research initiatives.
2. **Compensation:** Salaries for highly skilled engineers and data scientists in this sector are competitive, particularly for those working on large, internationally-financed infrastructure projects. There is a high premium on specialized expertise

in areas like geothermal engineering or solar project finance.

### 13.5 Sub-Sector Growth Trajectory and Outlook

The Climate Tech sub-sector in Ethiopia is set for substantial growth, driven by a combination of necessity and opportunity.

Key growth drivers include:

1. **Abundant Renewable Resources:** Ethiopia has immense, largely untapped potential in solar, wind, and geothermal energy, in addition to its already significant hydropower resources.<sup>160</sup>
2. **Government Strategy:** The government has a clear strategy to become a major power hub in Africa, with plans to significantly increase generation capacity and export electricity to neighboring countries like Kenya and Djibouti.<sup>116</sup>
3. **Climate Vulnerability:** The increasing frequency and severity of droughts make investment in climate-resilient agriculture and water management a national security imperative, driving demand for climate data and adaptation technologies.<sup>160</sup>
4. **International Funding:** Climate finance is a major priority for international development partners like the World Bank and JICA, providing a significant source of capital for renewable energy and climate adaptation projects.<sup>87</sup>

The outlook is very strong, particularly in the renewable energy space. The recent tenders for large-scale solar projects signal a clear move to diversify the energy mix away from an over-reliance on hydropower.<sup>157</sup> The circular economy is also a promising area for growth, as demonstrated by the success of startups like Kubik. The primary challenge will be to build the domestic human capital required to design, manage, and operate these increasingly complex and technologically advanced systems.

## Chapter 14: Platform and Ecosystem Management



As Ethiopia's digital economy matures, a new and critical sub-sector is emerging: Platform and Ecosystem Management. This field is concerned with the design, operation, and growth of large-scale digital platforms that connect multiple user groups (e.g., buyers and sellers, drivers and riders, developers and users). The roles in this sub-sector are highly strategic, requiring a blend of technical understanding, business acumen, and community-building skills to create and manage thriving digital marketplaces and service ecosystems.

## 14.1 Market Landscape and Key Employers

The key employers are the companies that operate the most significant digital platforms in the country.

### 5. Telecommunications and Fintech Platforms:

1. **Ethio Telecom:** With its **telebirr** SuperApp, Ethio Telecom is a dominant platform player. The launch of its e-commerce marketplace, **Zemen Gebeya**, integrated within telebirr, is a major move to create a comprehensive digital ecosystem connecting MSMEs with its vast user base of over 52 million subscribers.<sup>1</sup>
2. **Safaricom (M-Pesa):** As a major competitor, Safaricom's M-Pesa platform is another key ecosystem. The integration of M-Pesa with services like Nyala Insurance demonstrates the expansion of its platform beyond simple payments.<sup>63</sup>
3. **ArifPay:** As a payment gateway and mobile point of sale (MPOS) system, ArifPay operates a platform connecting banks, merchants, and consumers.<sup>34</sup>

### 6. E-commerce and Delivery Platforms:

1. **Deliver Addis:** A pioneer in online food delivery in Ethiopia, this company operates a platform connecting restaurants with customers.<sup>38</sup>
2. **Eshi Express:** A logistics platform that connects businesses and individuals needing delivery services with a network of couriers. They offer services like warehousing and cash-on-delivery, building a comprehensive logistics ecosystem.<sup>39</sup>

### 7. Talent and Service Marketplaces:

1. **Gebeya:** Operates a SaaS-enabled talent cloud, a platform that connects vetted African tech professionals with companies seeking their skills. Their

platform includes features for managing provider networks and connecting customers with talent.<sup>32</sup>

2. **HahuJobs:** A sophisticated labor market platform that uses data-driven matching to connect job seekers with employers. It functions as an ecosystem of digital services for job seekers, employers, government, and development partners.<sup>138</sup>

## 14.2 Workforce Composition and Role Catalogue

The roles in this sub-sector are focused on managing the complex interactions and growth dynamics of multi-sided platforms.

### 1. **Product Management for Large-Scale Digital Services:**

1. **Product Manager / Product Lead:** This is a central strategic role responsible for the vision, strategy, and execution of a digital platform or a major feature within it. A posting for a **Product Lead – Value Added Services (VAS)** at Safaricom exemplifies this role, which would involve managing the lifecycle of digital services offered on their platform.<sup>163</sup>
2. **Chief Product Officer (CPO):** An executive-level role, advertised by a fintech company, responsible for the entire product portfolio. This leader defines the product vision and ensures it aligns with the company's business goals.<sup>52</sup>

### 2. **Ecosystem Architecture Design:**

1. **Ecosystem Architect / Platform Architect:** A senior technical and strategic role responsible for designing the architecture of the entire digital ecosystem. This involves defining the rules of interaction, the data models, the API strategies, and how different participants (e.g., users, merchants, developers) will connect and create value.
2. **Senior Solutions Architect:** A role advertised by Gebeya, responsible for analyzing enterprise specifics and developing a clear roadmap of business solutions within the platform's architectural framework.<sup>143</sup>

### 3. **Community and Developer Relations:**

1. **Community Manager:** Responsible for engaging with and growing the user base of a platform. This could involve managing social media, organizing events, and gathering user feedback to inform product development.

2. **Developer Relations / Evangelist:** A role focused on building and supporting a community of third-party developers who build on top of a platform's APIs. This is crucial for platforms that want to foster an ecosystem of external innovation.
4. **Platform Operations at Enterprise Scale:**
  1. **Platform Operations Manager:** Responsible for the day-to-day health and performance of the platform. This includes monitoring system stability, managing incident response, and ensuring a smooth user experience for all participants. The role of **Big Data Platform Operations Engineer** at Safaricom, responsible for designing and implementing the big data platform, is a specialized version of this function.<sup>27</sup>
  2. **Operations Manager (Merchant Growth):** A role at a fintech platform like ArifPay, responsible for leading and scaling merchant operations. This includes designing onboarding processes, optimizing the merchant experience, and establishing KPIs for merchant acquisition and retention.<sup>35</sup>

### 14.3 Competency and Qualification Matrix

5. **Formal Education:** A Bachelor's degree in **Business, Computer Science, Economics, or a related field** is common. An **MBA** is often preferred for senior product management and strategic roles.
6. **Technical and Strategic Skills:**
  1. **Product Management:** Deep expertise in product lifecycle management, user research, A/B testing, and agile development methodologies.
  2. **Data Analysis:** The ability to analyze user behavior data, platform metrics, and market trends to make data-driven product and strategy decisions is critical.
  3. **Technical Literacy:** While not always a coding role, a strong understanding of software architecture, APIs, and platform technologies is essential to work effectively with engineering teams.
  4. **Business Acumen:** A deep understanding of business models, market dynamics, and competitive strategy is required to grow a successful platform.
  5. **Ecosystem Thinking:** The ability to think about the platform not as a single product, but as a complex system with multiple interacting participants and feedback loops.

7. **Soft Skills:** Exceptional **communication and stakeholder management** skills are paramount, as these roles involve coordinating between users, developers, business partners, and internal teams. **Leadership** and **influence** are key for product managers who must lead teams without direct authority.

#### 11.4 Employment and Compensation Structure

8. **Employment Types:** These are almost exclusively **permanent, full-time** roles, as they are core to the strategic operation of the platform companies.
9. **Compensation:** Roles in platform and ecosystem management are highly strategic and therefore command high salaries, competitive with top-tier technology and management positions. Compensation packages often include performance-based bonuses tied to the growth and success of the platform (e.g., user growth, transaction volume).

#### 14.5 Sub-Sector Growth Trajectory and Outlook

The Platform and Ecosystem Management sub-sector is set to grow in direct proportion to the growth of Ethiopia's digital economy. As more economic activity moves online, the number and scale of digital platforms will increase, driving demand for professionals who can manage them.

Key growth drivers include:

1. **The Rise of SuperApps:** The strategic push by major players like Ethio Telecom (with telebirr) to create "SuperApps" that bundle multiple services (payments, e-commerce, communication) will create a significant number of complex platform management roles.<sup>63</sup>
2. **Sector-Specific Platforms:** The success of specialized platforms in areas like recruitment (HahuJobs), talent (Gebeya), and logistics (Eshi Express) demonstrates the potential for new platforms to emerge in other sectors (e.g., agriculture, tourism, real estate).
3. **The API Economy:** As platforms open up their APIs to third-party developers, there will be a growing need for roles in developer relations and ecosystem

management to support and cultivate this external innovation.

The outlook is very strong. This sub-sector represents some of the most complex and high-value work in the Platinum Economy. The primary challenge will be finding talent with the rare combination of technical depth, business strategy, and community management skills required to build and scale these digital ecosystems successfully.

## Chapter 15: Data and Analytics Consulting

The Data and Analytics Consulting sub-sector provides specialized advisory services to help organizations harness the power of data. As businesses and government agencies in Ethiopia collect ever-increasing volumes of information, the demand for experts who can transform this raw data into strategic assets is growing rapidly. Consultants in this field offer a range of services, from high-level data strategy and AI governance to hands-on data science and business intelligence implementation.

### 15.1 Market Landscape and Key Employers

The employers in this space are a mix of specialized data consultancies, the data and analytics practices of large global consulting firms, and technology companies that offer data-related services.

#### 4. Global Consulting Firms:

1. **McKinsey & Company (QuantumBlack):** QuantumBlack is McKinsey's AI and advanced analytics arm. They hire Data Scientists and Data Engineers for their regional hubs, serving clients on complex data challenges.<sup>99</sup>
2. **Deloitte, PwC, KPMG, BCG:** All the major global advisory firms have practices focused on data, analytics, and AI. They advise clients on everything from data strategy to the implementation of analytics platforms.<sup>92</sup> KPMG, for instance, has a specific focus on "Intelligent Automation" and "Function Analytics".<sup>98</sup>

#### 5. Specialized Data and Tech Consultancies:

1. **Kagool:** A global data and analytics group with a presence in Ethiopia. They

hire for roles like **Data Scientist** and specialize in using platforms like Microsoft Azure to deliver data science projects, including building machine learning models and data pipelines.<sup>58</sup>

2. **iCog Labs:** While also a product company, iCog Labs provides services in machine learning-based data analysis, serving international customers.<sup>29</sup>
3. **CITCOT ICT Consulting:** A local firm that lists "BI & Big Data Consulting" as one of its key service areas.<sup>165</sup>
6. **Technology Companies with Consulting Arms:**
  1. Companies that sell data-related software or platforms often have professional services teams that provide consulting and implementation support to their customers.

## 15.2 Workforce Composition and Role Catalogue

The roles in

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# Mapping the Yellow Economy: An Analytical Report on Public Sector Employment for Ethiopia's National Development

## Section 1: The Architecture of Ethiopia's Public Sector Employment

This section establishes the foundational context of Ethiopia's public and quasi-public employment landscape, defining its key institutions, statistical scale, and the legal and policy framework that underpins it. This analysis provides the essential macroeconomic and institutional backdrop for understanding the workforce dynamics, challenges, and opportunities detailed in this report.

### 1.1 Delineating the "Yellow Economy": Key Institutions and Structures

The term "Yellow Economy" in the Ethiopian context refers not to a single monolithic entity but to a complex, multi-layered ecosystem of institutions responsible for public service delivery, governance, and national development. A comprehensive mapping of this landscape must extend beyond the traditional civil service to include federal ministries, autonomous agencies, regional administrative bodies, and the vast, influential network of non-governmental and international organizations that operate in parallel and in partnership with the state.

At the apex of this structure are the **Federal Ministries and Agencies** of the Government of Ethiopia. These are the primary engines of national policy and administration. The executive branch is structured around approximately 22 core ministries, including major employers such as the Ministry of Finance, Ministry of Health, Ministry of Education, Ministry of Agriculture, Ministry of Industry, Ministry of Peace, and the Ministry of Revenue.<sup>1</sup> These ministries are the statutory bodies

responsible for everything from fiscal policy and tax collection to healthcare provision and agricultural transformation.<sup>1</sup>

Complementing the ministries are a range of specialized **Commissions and Authorities** that serve both regulatory and operational functions. The Federal Civil Service Commission stands out as a pivotal institution, tasked with the administration and management of public servants, though it has undergone various structural changes over the years, previously falling under the Ministry of Public Service and Human Resource Development.<sup>6</sup> Other key bodies include the Ethiopian Statistics Service (ESS), which is the primary source of national labor market data, and the Authority for Civil Society Organizations (ACSO), which regulates the extensive NGO sector.<sup>9</sup> These organizations are not only significant employers in their own right but also shape the rules of engagement for other actors within the Yellow Economy.

The decentralized federal structure of Ethiopia means that **Regional, Zonal, and Woreda Administrations** represent a substantial portion of public sector employment. Job vacancy data consistently shows opportunities located outside the capital, Addis Ababa, in regional states such as Tigray, Oromia, Amhara, and SNNPR, indicating that regional bureaus are actively recruiting to deliver services at the local level.<sup>11</sup> These sub-national government bodies are the front line of public service delivery and constitute a major segment of the civil service workforce.

Finally, the **Development Partner Ecosystem** forms a critical, quasi-public layer of the Yellow Economy. This includes a wide array of international and local Non-Governmental Organizations (NGOs), multilateral institutions like the United Nations (UN) and its various agencies (UNDP, UNICEF, WHO, WFP), and bilateral donors.<sup>14</sup> These organizations, such as Mercy Corps, the Danish Refugee Council, and Save the Children, often work in close partnership with government ministries to implement development and humanitarian projects.<sup>11</sup> Their role is so intertwined with public objectives that they function as a parallel, and often better-resourced, arm of public service delivery, particularly in areas like humanitarian response, governance reform, and specialized technical assistance.<sup>17</sup> This intricate web of state and non-state actors collectively constitutes the Ethiopian Yellow Economy.

The following table provides a structured overview of the main institutional actors in this ecosystem. This categorization is essential for understanding the functional diversity and complexity of the public employment landscape. It moves beyond a simple list of government offices to reveal the interconnected system of state, quasi-

state, and non-state entities that collectively shape public sector workforce dynamics. This framework serves as a foundational reference for the subsequent analysis of recruitment mechanisms and skills demand.

**Table 1: Key Public Sector and Quasi-Public Employers in Ethiopia**

Institution Category	Institution Name (Example)	Mandate/Key Functional Area	Key Data Sources
<b>Federal Ministry</b>	Ministry of Finance	National economic policy, budget, fiscal management	1
	Ministry of Health	National health policy, service delivery, public health	1
	Ministry of Education	National education policy, curriculum, higher education	1
	Ministry of Agriculture	Agricultural development, food security, rural transformation	1
	Ministry of Revenue	Tax policy and administration, revenue collection	1
<b>National Commission/Authority</b>	Federal Civil Service Commission	Civil service administration, recruitment standards, HR policy	6
	Ethiopian Statistics Service (ESS)	National data collection, census, labor force surveys	9
	Authority for Civil Society Organizations (ACSO)	Registration and regulation of NGOs/CSOs	10

<b>Regional Administration</b>	Tigray Regional Administration	Sub-national governance, local service delivery, peacebuilding	17
	Oromia Regional Administration	Sub-national governance, local service delivery	11
<b>Multilateral Organization</b>	United Nations Development Programme (UNDP)	Governance, peacebuilding, sustainable development	17
	World Health Organization (WHO)	Public health emergencies, health system strengthening	23
	World Bank	Development finance, poverty reduction, policy advice	25
<b>International NGO</b>	Mercy Corps	Humanitarian response, market systems, peace & social cohesion	11
	Danish Refugee Council (DRC)	Refugee protection, humanitarian aid, supply chain management	12
	Save the Children	Child protection, education, health and nutrition	18
<b>Local NGO</b>	Mission for Community Development Program (MCDP)	Integrated urban/rural development, women & children empowerment	28
	Consortium of Ethiopian Human	Human rights advocacy,	29

	Rights Organizations (CEHRO)	democracy, conflict management	
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## 1.2 Statistical Overview of the Public Sector Workforce

The public sector in Ethiopia is not only the backbone of administration and governance but also a cornerstone of the national labor market, particularly in urban areas. According to the 2022 Urban Employment Unemployment Survey conducted by the Ethiopian Statistics Service (ESS), government employees constitute a significant 22.5% to 23% of the total urban employed population.<sup>20</sup> This underscores the state's critical role as a primary source of formal employment and economic stability for a large segment of the workforce.

However, this role is set against a challenging demographic and economic backdrop. Ethiopia is one of Africa's fastest-growing economies, yet it remains one of the poorest, with a national poverty rate that increased between 2016 and 2021.<sup>25</sup> The country faces the monumental task of creating approximately two million new jobs each year to absorb its burgeoning youth population.<sup>25</sup> The ESS data paints a stark picture of the employment challenge: the national urban unemployment rate stood at 19.4% in February 2022.<sup>20</sup>

The data reveals profound demographic disparities within the labor market. The employment-to-population ratio for urban males is 60.7%, significantly higher than the 38.7% for females. This gap is even more pronounced in unemployment figures, where the rate for females (28.2%) is more than double that for males (11.5%).<sup>20</sup> Youth (defined as ages 15-29) are disproportionately affected, facing an unemployment rate of 26.5%.<sup>20</sup> These statistics highlight that public sector hiring policies and practices are not merely administrative functions; they are critical instruments that can either alleviate or exacerbate deep-seated issues of social and economic inequality. The public sector's capacity to provide stable, equitable employment is a key determinant of national stability and its ability to harness a potential demographic dividend. Failure to effectively manage this role risks fueling social tension among a large and increasingly educated youth population.



### 1.3 The Legal and Policy Framework for Public Employment

Employment within the Ethiopian public sector is governed by a specific legal and policy architecture designed to regulate the civil service. The foundational legal instrument is the Federal Civil Servants Proclamation, which establishes the terms of employment, including recruitment procedures, salary scales, and disciplinary measures.<sup>32</sup> A key provision within this framework is the stipulation that permanent government employment is generally reserved for Ethiopian nationals, although exceptions exist for temporary roles or for foreign citizens of Ethiopian origin.<sup>32</sup> Furthermore, tax laws such as the Federal Income Tax Proclamation No. 979/2008 define the fiscal responsibilities of both public sector employers and their employees, integrating them into the national revenue system.<sup>34</sup>

Beyond the foundational legal code, there is a clear and frequently articulated policy drive towards public sector modernization. High-level government officials, including the Deputy Prime Minister, have emphasized the need to make public services "ዘመናዊ እና ቀልጣፋ" (modern and efficient).<sup>35</sup> This ambition is reflected in various strategic documents and reform programs. The existence of a dedicated Strategic Support to Civil Service Reform (SSCSR) project, which focuses on strengthening audit practices and implementing new HR strategies, demonstrates a tangible commitment to this agenda.<sup>36</sup> Similarly, the Ministry of Health's "Information Revolution" strategy, a core component of its Health Sector Transformation Plan, aims to create a culture of data-driven decision-making, representing a model of modernization within a specific ministry.<sup>24</sup> These policies and proclamations form the official backdrop against which the realities of public sector recruitment, skills demand, and workforce capacity must be assessed.

## Section 2: The Digital Frontier: Online Portals and the Modernization of Recruitment

The interface between Ethiopia's public sector employers and the national talent pool is increasingly mediated by a dynamic and evolving ecosystem of online job portals. These digital platforms are not merely passive advertisers of vacancies; they actively

shape the recruitment landscape, revealing critical trends in modernization, efficiency, and the persistent digital divides that characterize the Yellow Economy.

## 2.1 The Online Job Market Ecosystem

The Ethiopian online job market is dominated by a handful of major private platforms, each with a distinct market position and service offering. **Ethiojobs** stands as the market leader, boasting a network of over 1,000,000 active candidates and attracting 30,000 daily visitors.<sup>37</sup> It serves a broad spectrum of industries and is a particularly prominent channel for vacancies from the NGO and development partner community.<sup>11</sup> Recognizing the specific challenges faced by new entrants to the labor market, Ethiojobs operates

**Dereja**, a specialized sub-brand dedicated to tackling youth unemployment. With a database of over 140,000 fresh graduates, Dereja aims to bridge the gap for a demographic often overlooked by a job market that demands prior experience.<sup>37</sup>

In contrast, **HahuJobs** has carved a niche with a technology-centric, data-driven approach. Its mission is to capture "structured data of the Ethiopian skilled and non-skilled labor market" through a suite of digital services.<sup>39</sup> This platform distinguishes itself with innovative features like biometric-based jobseeker identification, automated job matching algorithms, and specialized modules for industrial parks and university graduate tracing.<sup>40</sup> This positions HahuJobs not just as a job board, but as a potential technology partner for large-scale public sector workforce management and modernization.

Other significant platforms such as **GeezJobs** and **HarmeeJobs** contribute to the richness of the digital ecosystem, listing a diverse array of vacancies from public, private, and non-profit employers across various regions.<sup>27</sup> Complementing these domestic platforms are

**International and Specialized Portals** like ReliefWeb, ImpactPool, and various UN-specific career sites.<sup>16</sup> These international portals are the primary conduits for high-level, internationally-funded positions, particularly in the humanitarian, development, and diplomatic sectors, attracting both national and international talent for roles that often involve managing large-scale development programs.

## 2.2 Innovations and Frictions in Digital Recruitment

The digital recruitment landscape in Ethiopia is characterized by both cutting-edge innovation and significant structural frictions. On one hand, platforms like HahuJobs are pioneering advanced solutions, offering employers cloud-based Human Resource Management (HRM) systems that automate everything from vacancy posting and applicant management to payroll processing and employee evaluations.<sup>41</sup> The use of biometric identification to manage mass registration of job seekers for industrial parks is a particularly noteworthy innovation, addressing a specific need for managing large, low-skilled labor pools with greater accuracy and efficiency.<sup>40</sup>

On the other hand, a stark **digital divide** persists between these sophisticated private platforms and the official recruitment channels of the government. While ministries such as the Ministry of Revenue and the Ministry of Industry maintain vacancy pages on their websites, these are often static, difficult to navigate, and provide incomplete listings compared to the major job aggregators.<sup>4</sup> Academic research reinforces this observation, noting that local public employment service offices (BoLSA) often still rely on inefficient "paper based processes" and "manual matching" of job seekers to vacancies.<sup>48</sup> This creates a two-track recruitment system. The most dynamic, skilled, and internationally-oriented talent is channeled through modern, efficient, English-language private portals, which predominantly feature private sector and NGO roles. Conversely, traditional civil service positions are often advertised through less accessible and less efficient government channels. This structural disadvantage inhibits the public sector's ability to compete for top-tier talent from the very first stage of the recruitment process.

This divide is further compounded by **language and accessibility** issues. Official government announcements, such as those from the Ministry of Revenue, are typically posted in Amharic.<sup>4</sup> In contrast, the major job boards and virtually all postings for NGO and UN positions are in English.<sup>11</sup> This linguistic bifurcation can create barriers for job seekers and reinforces the separation between the core civil service and the internationally-oriented development sector. Concurrently, informal channels like YouTube and other social media platforms are emerging as sources of job information, often in Amharic, highlighting a demand for more accessible communication that is not always met by formal systems.<sup>49</sup>

The existence of a dedicated platform like Dereja, focused solely on fresh graduates, points to another critical friction in the market.<sup>37</sup> Its mission to provide "job readiness and employability skills training" and host "career expos" is a direct response to a market failure where employers demand experience that graduates inherently lack. This indicates that the challenge for new entrants is not merely one of information access but of a fundamental gap between academic preparation and workplace expectations, a gap that specialized intermediaries are stepping in to fill. This dynamic strongly suggests that solutions for youth unemployment must go beyond simple job matching to include structured programs for skills development and workplace integration.

The advanced capabilities of private platforms like HahuJobs present a clear and immediate opportunity for public sector modernization. Their existing infrastructure for structured data capture, biometric identification, and automated matching directly addresses the systemic weaknesses of paper-based, manual public employment services.<sup>39</sup> Rather than attempting to build these complex digital systems from scratch, a strategic partnership with a local technology provider could allow the government to rapidly leapfrog its current technological limitations. Such a collaboration could dramatically accelerate the modernization of civil service recruitment, data management, and national workforce planning, aligning with the government's stated reform objectives.<sup>35</sup>

## **Section 3: Demand-Side Deep Dive: A Taxonomy of Public Sector Roles**

An in-depth analysis of job vacancies advertised across Ethiopia's digital landscape reveals a distinct demand profile for the Yellow Economy. The skills, qualifications, and experience sought by public and quasi-public employers paint a clear picture of the capabilities required to navigate the country's development and governance challenges. This demand is heavily influenced by the operational models of international development partners, creating a unique and often challenging labor market.

### 3.1 High-Demand Functional Areas

A systematic review of job postings from platforms like Ethiojobs, GeezJobs, and HarmeeJobs allows for the creation of a taxonomy of high-demand roles. Several functional areas consistently dominate the recruitment landscape:

166. **Project & Program Management:** This is arguably the most prevalent category, particularly within the NGO and development partner sphere. Titles such as "Project Manager," "Program Manager," and "Project Specialist" are ubiquitous across all major job boards.<sup>11</sup> These roles are the operational backbone of the development sector, requiring a specific skill set in planning, budgeting, implementation, stakeholder management, and reporting, often according to strict donor guidelines.
167. **Monitoring & Evaluation (M&E):** Inextricably linked to project management, M&E has become a critical and frequently advertised specialization. The demand for "M&E Managers," "M&E Specialists," and other roles with a strong M&E component is a direct reflection of the donor community's emphasis on results-based management, accountability, and evidence-based programming.<sup>53</sup> This has created a demand for professionals skilled in designing logical frameworks, collecting and analyzing data, and evaluating program impact.
168. **Finance, Audit, and Compliance:** This core function is essential across all parts of the Yellow Economy. Government bodies like the Ministry of Revenue recruit for specialized roles such as "Tax Audit Lead Expert" and "Tax Debt Collection Senior Expert".<sup>4</sup> Simultaneously, NGOs and international organizations post vacancies for "Senior Internal Audit and Compliance Officers," "Finance and Admin Assistants," and risk management professionals.<sup>13</sup> These positions demand expertise in financial regulations, internal controls, donor compliance, and risk mitigation.
169. **Policy, Research, and Data Analysis:** There is a clear, albeit more specialized, demand for high-level analytical talent. The Federal Civil Service Commission seeks individuals for roles like "Policy & Strategy Research Analyst," and think tanks like the Policy Research Institute hire "Senior Researchers".<sup>6</sup> A significant emerging trend is the demand for "new economy" skills. Job postings for "Data Visualization Specialists" and "Data Analysts" are becoming more common, signaling a shift towards more sophisticated, evidence-based decision-making and communication.<sup>60</sup>
170. **Community Development & Social Work:** This remains a foundational area

for many NGOs and grassroots initiatives. Roles such as "Youth Empowerment Project Officer," "Community Development Specialist," and "Rural Development Expert" are frequently advertised.<sup>28</sup> These positions require on-the-ground skills in community mobilization, participatory needs assessment, training facilitation, and social program implementation.

171. **Communications & Public Relations:** The need to manage public image, conduct advocacy, and engage with stakeholders drives demand for communications professionals. Vacancies for "Communications Managers," "PR and Communication Officers," and "Communications and Outreach Specialists" are common, requiring skills in media relations, content creation, and strategic messaging.<sup>66</sup>
172. **Education & Training:** Reflecting the broader focus on human capital development, there is a consistent demand for professionals in education and training. These are not typically classroom teaching roles, but rather positions focused on capacity building, such as "Training Manager" for teachers, "Curriculum and Teaching Expert," and "Functional and Adult Training Facilitator".<sup>69</sup>

This pattern of demand reveals that the Yellow Economy job market is heavily "projectized." The prevalence of roles centered on the project management cycle—from design (proposal writing) and implementation (project management) to oversight (M&E) and reporting (grant management)—is not coincidental. It is a direct consequence of a development model heavily funded by international partners who operate through discrete, time-bound, and rigorously monitored projects. This has created a labor market where skills in project cycle management, logical framework analysis, and donor compliance are often valued more highly than traditional public administration competencies, a reality with profound implications for workforce development and educational planning.

### **3.2 Deconstructing Job Requirements: Qualifications, Experience, and Compensation**

An analysis of job descriptions reveals a clear hierarchy of requirements that shape career progression within the Yellow Economy.

173. **Educational Qualifications:** A Master's degree in a relevant field—such as

Development Studies, Public Policy, Economics, Law, or Social Sciences—is frequently the minimum requirement for mid-to-senior level professional positions, especially in policy, M&E, and program management.<sup>6</sup> A Bachelor's degree is the standard entry point for officer-level and junior professional roles.<sup>63</sup>

174. **Experience Levels:** Professional experience is a critical and often formidable barrier to entry. Senior and managerial roles typically demand a minimum of five to eight years of relevant experience, with some specialist positions requiring over 12 years.<sup>6</sup> Even officer-level positions often require two to four years of prior work, creating the "experience gap" that poses a significant challenge for the country's large cohort of fresh graduates.<sup>63</sup>
175. **Compensation Disparities:** The most striking feature of the demand-side landscape is the vast and systemic disparity in compensation between the core civil service and the international development sector. A senior-level "Policy & Strategy Research Analyst VI" at the Federal Civil Service Commission, requiring a Master's degree and eight years of experience, is offered a salary of ETB 15,340 per month (approximately \$265 USD at current exchange rates).<sup>6</sup> In stark contrast, a "Project Manager" position with the World Health Organization (WHO), requiring seven years of experience, offers a monthly salary of \$3,957.92 USD.<sup>23</sup> Even an assistant-level role in an NGO, such as a "Finance/HR Assistant," can command a salary of \$869 USD per month.<sup>58</sup>

This enormous salary differential is the primary driver of a significant **"internal brain drain."** The most skilled, experienced, and often internationally-educated Ethiopian professionals are rationally drawn away from core government roles into the much higher-paying NGO and multilateral sector. This systematically weakens the long-term institutional capacity of the very government ministries that development projects are designed to support. It creates a dependency cycle where government bodies lack the internal capacity to perform complex technical and managerial functions, necessitating external support from donor-funded projects, which are staffed by the very talent the government cannot afford to hire directly. This dynamic represents a critical, systemic weakness in Ethiopia's public sector and undermines the sustainability of development efforts.

The following table provides a taxonomy of the most common job categories, mapping them to the skills, qualifications, and experience levels in highest demand. This demand profile is the essential data needed for a comparative analysis with the outputs of the education system, forming the basis for the skills gap analysis in the subsequent section.



**Table 2: Taxonomy of High-Demand Public Sector Job Categories**

Functional Category	Representative Job Titles	Key Required Skills	Common Educational Background	Typical Experience	Representative Salary (Monthly)
<b>Project &amp; Program Management</b>	Project Manager, Program Officer, Project Specialist	Project Cycle Management, Budgeting, Stakeholder Engagement, Reporting	MA in Development Studies, Public Admin, Social Sciences	5-8+ years	International: \$2,500 - \$4,000+
<b>Monitoring &amp; Evaluation (M&amp;E)</b>	M&E Manager, M&E Specialist, MEAL Officer	Data Collection & Analysis, Logframe Design, Impact Assessment, M&E Software (SPSS, Stata)	MA in Statistics, Economics, Development Studies	5-7+ years	International: \$2,000 - \$3,500+
<b>Finance, Audit &amp; Compliance</b>	Finance Officer, Internal Auditor, Compliance Manager, Tax Expert	Financial Reporting, Risk Management, Donor Compliance, Internal Controls	BA/MA in Accounting, Finance	4-8+ years	Government: ~\$250 (Senior) International: \$800 - \$2,500+
<b>Policy, Research &amp; Data</b>	Policy Analyst, Researcher, Data Visualization Specialist	Policy Analysis, Quantitative/Qualitative Research, Data Visualization (Tableau,	PhD/MA in Economics, Public Policy, Data Science	8+ years	Government: ~\$265 (Senior Analyst) International: Varies widely

		Power BI), Report Writing			
<b>Community Development &amp; Social Work</b>	Youth Empowerment Officer, Livelihoods Officer	Community Mobilization, Training Facilitation, Social Work, Participatory Methods	BA in Social Work, Sociology, Rural Development	2-5+ years	International /NGO: \$600 - \$1,200
<b>Communications &amp; Public Relations</b>	Communications Manager, Outreach Specialist, PR Officer	Media Relations, Content Creation, Strategic Communication, Advocacy	BA/MA in Communications, Journalism, Marketing	4-8+ years	International: \$1,500 - \$3,000+

## Section 4: Supply-Side Dynamics: Aligning Education with Public Service Needs

This section critically assesses the capacity of Ethiopia's higher education system to supply graduates equipped with the skills and competencies demanded by the modern Yellow Economy. It examines the scale of the graduate pipeline, the persistent gap between academic training and employer needs, and the motivations of job seekers, highlighting areas of both alignment and critical disconnect.

### 4.1 The Graduate Pipeline and Employability Challenges

The Ethiopian government has made a colossal investment in expanding higher education over the past two decades. The student population swelled from 7.1 million in 2000 to 26 million in 2020, supported by an investment that has at times

constituted up to 42% of the total education budget.<sup>25</sup> The strategic intent behind this expansion was to build human capital and supply the skilled workforce needed for a growing economy.

Despite this massive input, the system is yielding diminishing returns in terms of graduate employability. Academic studies and labor market data converge on a single conclusion: there is a significant and worsening problem of graduate unemployment. The share of unemployed graduates relative to the total unemployed population more than doubled in just four years, rising from 2.6% in 2014 to 6.61% in 2018.<sup>73</sup> Research explicitly points to a "lack of coordination and integration between the education system and the labor market" and concludes that "significant numbers of students are facing difficulty in getting employment".<sup>74</sup> This creates a dangerous paradox: the state is investing heavily to produce a large cohort of educated youth who then face frustration and disillusionment in the job market, a classic precursor to social and political instability. The problem is not a lack of graduates, but a lack of

*employable* graduates, indicating that the policy focus must urgently shift from quantity of enrollment to the quality and relevance of education.

Educational institutions are not oblivious to this crisis. Many universities have established career centers and offer services like CV writing workshops and networking events to connect students with potential employers.<sup>73</sup> However, research suggests these interventions are insufficient, with one study concluding that the policies and strategies currently in place are "not satisfactory to enhance the employability of the graduates".<sup>74</sup>

## **4.2 The Skills Mismatch: Hard and Soft Competencies**

The core of the employability problem lies in a fundamental mismatch between the skills supplied by the education system and those demanded by the labor market. The demand-side analysis in Section 3 demonstrated a clear need for a blend of practical, applied, and soft skills. Job descriptions consistently call for competencies in project management, data analysis, strategic communication, teamwork, and adaptive problem-solving.<sup>53</sup>

The education system, however, is frequently criticized for its theoretical orientation,

failing to equip students with these practical skills. A study of engineering graduates, for example, found that although many found jobs, their academic training "did not meet employing requirement," pointing to a curriculum that prioritizes theoretical knowledge over the applied competencies needed in the workplace.<sup>73</sup> This suggests that the skills gap is not merely technical but systemic. The job market, particularly the projectized development sector, demands "doers," "managers," and "facilitators," while the education system is still largely geared towards producing "theorists."

This disconnect is starkly illustrated by the case of Monitoring and Evaluation (M&E). As established, M&E is a high-demand professional field in Ethiopia's Yellow Economy. Yet, a comprehensive desk review of the country's development evaluation culture found that there are "almost no higher academic learning institutions which offer a curriculum for M&E professionals".<sup>75</sup> This direct contradiction between high market demand and non-existent academic supply represents the most glaring evidence of the skills mismatch and points to a critical failure in aligning educational programming with national development needs.

### 4.3 Job Seeker Perspectives and Motivations

Understanding the motivations and satisfaction drivers of the current workforce is crucial for developing effective retention strategies. A comparative study of academic employees in public and private universities in Addis Ababa offers valuable insights. The research found that while employees in private universities reported higher satisfaction with **pay and supervision**, their counterparts in public universities were significantly more satisfied with **job security**.<sup>76</sup>

This finding is of profound strategic importance. In a labor market where the public sector cannot possibly compete with the salaries offered by international organizations, its primary non-financial competitive advantage is the promise of stable, long-term employment. In an economic environment characterized by precarity and uncertainty, this is a powerful incentive for attracting and retaining talent. However, this advantage is fragile and can be easily eroded by poor management, a lack of clear career progression, and a deteriorating work environment. The high turnover of academic staff reported at institutions like Debre Birhan University, attributed to issues like "poor service delivery" and "lack of

systematic administration," demonstrates that job security alone is not enough.<sup>73</sup> The government must therefore protect and leverage its key strength by professionalizing its human resource management and fostering a work environment that makes a career in public service genuinely attractive, preventing a situation where it loses the competition for talent on all fronts—both pay and workplace quality.

The following table provides a visual analysis of the skills gap, directly comparing the demands of the Yellow Economy job market with the typical supply from the higher education system. This matrix provides a clear, evidence-based foundation for the policy recommendations on educational reform in Section 6.

**Table 3: Skills Gap Analysis - Public Sector Demand vs. Higher Education Supply**

Skill Category	Specific Skills Demanded in Job Market (Evidence)	Evidence of Supply from Education System	Gap Assessment
<b>Program &amp; Project Management</b>	Project Cycle Management, Grant Writing, Donor Reporting, Budgeting <sup>23</sup>	Generally absent from core curricula of Public Admin, Economics. Taught ad-hoc or in specialized, non-accredited trainings.	<b>High</b>
<b>Monitoring &amp; Evaluation (M&amp;E)</b>	M&E Framework Design, Data Collection & Analysis, Impact Evaluation, use of SPSS/Stata <sup>52</sup>	"Almost no higher academic learning institutions which offer a curriculum for M&E professionals". <sup>75</sup>	<b>Critical</b>
<b>Data &amp; Digital Skills</b>	Data Visualization (Tableau, Power BI), Data Analysis (Python, R), Digital Communications, HCD <sup>60</sup>	Emerging in Computer Science/IT programs, but largely absent from social science and public policy curricula where they are needed.	<b>High</b>
<b>Strategic</b>	Media Relations,	Journalism schools	<b>Medium</b>

<b>Communication</b>	Public Relations Strategy, Crisis Communication, Stakeholder Engagement <sup>66</sup>	exist, but strategic communication for policy and development is not a standard part of public admin training.	
<b>Soft Skills</b>	Teamwork, Problem-Solving, Adaptability, Cross-cultural Communication, Leadership <sup>63</sup>	Not explicitly taught; development is incidental rather than intentional. Employer feedback suggests graduates are lacking. <sup>73</sup>	<b>High</b>
<b>Core Technical Knowledge</b>	Economics, Law, Public Administration, Agriculture, Health Sciences	This is the primary focus and strength of the current higher education system. Graduates possess strong theoretical knowledge.	<b>Low</b>

## Section 5: Strategic Synthesis: Challenges and Opportunities for Workforce Modernization

Integrating the analyses of the institutional architecture, recruitment dynamics, and the supply-demand mismatch reveals a set of interconnected, systemic challenges confronting Ethiopia's public sector workforce. However, within these challenges lie significant opportunities for strategic intervention and modernization. This section synthesizes the findings to present a holistic picture of the frictions, partnerships, and evaluation deficits that define the current state of the Yellow Economy.

### 5.1 The Triad of Labor Market Frictions

The Ethiopian public sector labor market is hampered by a triad of persistent frictions that impede efficiency and effectiveness.

First, **Information Asymmetry** remains a fundamental barrier. Research indicates that job seekers struggle to learn about vacancies and effectively signal their skills to employers, while employers face difficulties in identifying suitable candidates.<sup>48</sup> This friction is exacerbated by the two-track recruitment system identified in this report, where the most dynamic jobs are advertised on modern, English-language platforms, while traditional civil service roles are often relegated to less efficient, Amharic-language government channels.

Second, the **Skills Mismatch** between educational outputs and labor market needs is a deep structural problem. As detailed in Section 4, the education system produces graduates with strong theoretical knowledge but often lacking the practical, digital, project management, and soft skills that are in high demand.<sup>74</sup> This gap between academic supply and market demand is a primary driver of graduate unemployment and employer dissatisfaction.

Third, **Institutional Bottlenecks** create structural impediments to a fluid labor market. The documented inefficiency of public employment services, which often rely on manual, paper-based processes, is a major constraint.<sup>48</sup> This is compounded by weak coordination between the government ministries that define workforce needs and the educational institutions responsible for training that workforce.<sup>74</sup> Furthermore, the country's nascent evaluation culture means there is no robust, systemic feedback loop to identify and correct these inefficiencies.<sup>75</sup>

## 5.2 The Public-Private-NGO Nexus: Collaboration and Competition

The relationship between the state, the private sector, and the NGO community is a complex dynamic of both competition and collaboration that profoundly shapes the Yellow Economy.

The most acute interaction is the **Competition for Talent**. As established by the vast compensation disparities, the core civil service is engaged in a losing battle with international organizations for Ethiopia's best and brightest professionals. This "internal brain drain" systematically pulls high-skilled labor out of government



ministries and into better-paying, donor-funded roles, creating a critical capacity gap at the heart of the state.<sup>6</sup>

Despite this competition, there is deep and essential **Collaboration in Service Delivery**. The development partner ecosystem is not an external actor but an integral part of how public services are delivered in Ethiopia. From peacebuilding and governance reform projects in post-conflict regions like Tigray to the implementation of national health and WASH (Water, Sanitation, and Hygiene) strategies, NGOs and UN agencies are the primary implementing partners for many government priorities.<sup>17</sup> This creates a symbiotic relationship where the government provides the strategic direction and legitimacy, while development partners provide the funding, technical expertise, and operational capacity. This model, however, reinforces the "projectization" of public service, where functions are carried out by temporary, externally funded units rather than by permanent, institutionalized government structures. While this can be effective for delivering specific outputs, it raises serious questions about long-term sustainability and institutional strengthening.

A third, emerging dynamic is the role of the **Private Sector as an Enabler**. Innovative local technology companies like HahuJobs and specialized consulting firms are developing the tools and providing the expertise that the public sector needs for its modernization agenda.<sup>15</sup> These private actors offer a pathway for the government to leapfrog technological and capacity gaps, shifting the dynamic from a simple public-private dichotomy to a more complex ecosystem of partnership.

### 5.3 Evaluating Modernization: Progress and Persistent Gaps

The Government of Ethiopia has articulated clear and ambitious goals for reform. National strategies like the Ten-Year Development Plan (2021-2030) and the Homegrown Economic Reform agenda signal a high-level commitment to transforming the economy and modernizing the state.<sup>82</sup> The stated push to create "modern and efficient" public services is a recurring theme.<sup>35</sup>

However, the capacity to measure progress against these ambitions is critically underdeveloped. The core challenge for Ethiopia's public sector is not a lack of plans, but a lack of institutional and human capacity to execute and evaluate them effectively. The national **Evaluation Deficit** is a central finding of this report. The

development evaluation culture is described as immature, with a historical focus on monitoring activities and inputs rather than rigorously evaluating outcomes and impact.<sup>75</sup> Crucially, key oversight bodies like the Office of the Federal Auditor General lack a formal evaluation function, and the Parliament has not historically exercised its power to commission independent evaluations of government programs.<sup>75</sup> Without a robust, independent, and empowered national evaluation culture, it is impossible to have a truly data-driven modernization. Reforms risk being guided by anecdote and political imperative rather than by evidence of what works.

This is not to say progress is absent. There are notable **Pockets of Excellence** within the system. The Ministry of Health's "Information Revolution" strategy is a prime example. It represents a systematic effort to build a culture of data use, digitalize health information systems, and strengthen governance from the federal down to the community level.<sup>24</sup> This initiative serves as a powerful internal case study for how a data-driven modernization agenda can be conceptualized and implemented within a major service-delivery ministry. The challenge is to scale such successful models across the entire public service.

## **Section 6: Actionable Recommendations for a Future-Ready Public Service**

This report has mapped the complex terrain of Ethiopia's Yellow Economy, identifying systemic challenges in recruitment, skills alignment, and institutional capacity. To address these challenges and build a public service capable of achieving the nation's development goals, the following actionable recommendations are proposed for key stakeholders. These recommendations are designed to be evidence-based, targeted, and mutually reinforcing.

### **6.1 For National Workforce Development**

**Target Audience:** Federal Civil Service Commission, Ministry of Labour and Skills, Regional Public Service Bureaus.

176. **Recommendation 1: Launch a "Public Service Digital Modernization Initiative."** The government should move decisively to close the digital divide in recruitment by partnering with innovative local technology firms. A pilot program should be initiated with a company like HahuJobs to create a unified digital platform for all civil service recruitment.<sup>39</sup> This platform should incorporate features such as structured CVs, skills-based automated matching, and biometric verification to dramatically improve the efficiency, transparency, and data-gathering capacity of public sector hiring. This directly addresses the inefficient, paper-based processes that currently put the civil service at a competitive disadvantage.<sup>48</sup>
177. **Recommendation 2: Develop and Implement a "National Public Service Competency Framework."** A standardized framework is needed to define the key skills and competency levels required for roles across the public sector. This framework should be informed by the demand-side analysis in this report, giving prominence to cross-cutting skills like Project Management, Monitoring & Evaluation, Policy Analysis, and Digital Literacy. This framework must then be used to systematically redesign all civil service job descriptions, performance appraisal systems, and career progression pathways, creating a clear and merit-based system for advancement.
178. **Recommendation 3: Implement a "Public Service Talent Retention Strategy."** Recognizing that the civil service cannot compete on salary alone with the international sector, this strategy must focus on strengthening its primary non-financial competitive advantage: job security and the appeal of a public service career.<sup>76</sup> This requires a concerted effort to professionalize HR management, ensure promotion is transparent and merit-based, invest in continuous professional development, and improve the overall work environment to counter the high turnover rates driven by poor administration.<sup>73</sup>

## 6.2 For Educational Planning

**Target Audience:** Ministry of Education, Public Universities, TVET Institutions.

179. **Recommendation 1: Mandate a Comprehensive, Demand-Driven Curriculum Review.** The Ministry of Education should mandate a nationwide review of curricula in fields relevant to public service (e.g., Public Administration,

Economics, Law, Social Sciences). This review must be directly informed by the Skills Gap Analysis (Table 3) presented in this report. The goal is to shift the pedagogical focus from purely theoretical knowledge to the integration of practical, applied learning modules, case studies, and problem-solving exercises that align with the demonstrated needs of the labor market.

180. **Recommendation 2: Establish Accredited Graduate Programs in High-Demand Fields.** To address the most critical skills deficits, leading institutions like Addis Ababa University should be supported to establish dedicated, accredited Master's degree programs in "Development Program Management" and "Monitoring & Evaluation." The near-total absence of local academic supply in M&E, a field with immense market demand, is an acute market failure that must be corrected urgently to build sustainable, domestic capacity.<sup>75</sup>
181. **Recommendation 3: Create a Mandatory "Public Service Internship Program."** To bridge the "experience gap" for new graduates, a mandatory, credit-bearing internship program should be integrated into all relevant undergraduate degrees. This program would require students to complete a semester-long placement in a government ministry, a regional bureau, or an approved partner NGO. Platforms like Dereja, which specialize in connecting graduates with opportunities, could be engaged as key partners in facilitating and managing this large-scale internship scheme.<sup>37</sup>

### 6.3 For Public Sector Modernization

**Target Audience:** Office of the Prime Minister, Ministry of Finance, National Planning Commission, Development Partners (World Bank, UNDP, etc.).

182. **Recommendation 1: Institutionalize a National Evaluation Policy and Strengthen the Evaluation Ecosystem.** A genuine, data-driven modernization is impossible without a culture of honest evaluation. The government, with support from partners, should formally adopt a National Evaluation Policy that mandates independent evaluations for major public programs. This must be coupled with capacity building for the entire ecosystem: providing institutional support and funding to the Ethiopian Evaluation Association, strengthening the M&E capacity of the National Planning Commission, and establishing an independent performance evaluation unit within the Office of the Federal Auditor General to

assess program effectiveness, not just financial compliance.<sup>75</sup>

183. **Recommendation 2: Redesign Development Partner Engagement to Mitigate "Internal Brain Drain."** Development partners and the government must collaboratively address the negative consequences of a fragmented, project-based labor market. Funding modalities should be diversified to move beyond creating parallel project implementation units. New approaches should be piloted, such as: (a) providing direct salary support or top-ups for a limited number of key technical and managerial positions within the civil service structure; (b) funding long-term technical advisors who are fully embedded within ministries rather than operating from separate offices; and (c) channeling development funds to directly support the Public Service Digital Modernization Initiative recommended above.
184. **Recommendation 3: Champion and Scale "Pockets of Excellence."** The "Information Revolution" strategy developed by the Ministry of Health provides a proven, domestic model for data-driven transformation.<sup>24</sup> The Prime Minister's Office and the National Planning Commission should champion this initiative as a best-practice case study. Its core principles—strong governance, digitalization of systems, and a focus on building a culture of data use for decision-making—should be systematically studied, adapted, and rolled out across other key service-delivery ministries, such as Education, Agriculture, and Water and Energy.

The following table provides a summary of these recommendations, mapping them to the key stakeholders responsible for their implementation. This creates a clear, actionable roadmap for building the future-ready public service that Ethiopia needs to achieve its development aspirations.

**Table 4: Summary of Recommendations Mapped to Key Stakeholders**

Rec. #	Recommendation Title	Key Challenge Addressed	Primary Implementing Agency	Key Supporting Partners	Proposed Timeline
6.1.1	Public Service Digital Modernization Initiative	Inefficient, non-transparent, and uncompetitive	Federal Civil Service Commission	HahuJobs, Ethiojobs, UNDP, World Bank	Short-term (1-2 yrs)

		e recruitment processes.			
<b>6.1.2</b>	National Public Service Competency Framework	Lack of standardized job roles and career paths; skills mismatch.	Federal Civil Service Commission	Ministry of Labour & Skills	Medium- term (3-5 yrs)
<b>6.1.3</b>	Public Service Talent Retention Strategy	High turnover and "internal brain drain" from core civil service.	Federal Civil Service Commission	All Ministries	Medium- term (3-5 yrs)
<b>6.2.1</b>	Demand- Driven Curriculum Review	Mismatch between theoretical education and practical job market needs.	Ministry of Education, Universities	Private Sector, NGOs	Medium- term (3-5 yrs)
<b>6.2.2</b>	Establish Graduate Programs in M&E and Program Management	Critical deficit of high-level skills in M&E and project management .	Ministry of Education, Addis Ababa University	UNDP, World Bank	Short-term (1-2 yrs)
<b>6.2.3</b>	Mandatory Public Service Internship Program	"Experience gap" for fresh graduates; high youth unemployment.	Ministry of Education, Universities	Dereja, NGOs, Ministries	Short-term (1-2 yrs)
<b>6.3.1</b>	Institutionali ze National	Lack of evidence-	PM Office, National	Ethiopian Evaluation	Medium- term (3-5

	Evaluation Policy	based feedback loop for policy and reform.	Planning Commission	Association, AfDB, World Bank	yrs)
<b>6.3.2</b>	Redesign Development Partner Engagement	"Internal brain drain" and fragmentation of public service capacity.	Ministry of Finance, Development Partners	All Ministries, UN System	Medium-term (3-5 yrs)
<b>6.3.3</b>	Champion and Scale "Pockets of Excellence"	Need for proven, scalable models of modernization.	PM Office, National Planning Commission	Ministry of Health, Relevant Ministries	Short-term (1-2 yrs)

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