EUROMONITOR INTERNATIONAL

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

Rwanda Report

Source: U.S. Agency for International Development (USAID)

USAID FROM THE AMERICAN PEOPLE

INTERNATIONAL COOPERATIVE RESEARCH GROUP

CDC U.S. Overseas Cooperative Development Council

mastercard foundation

IDRC · CRDI Canada

United Nations Economic Commission for Africa

ATPC African Trade Policy Centre

UN WOMEN

Euromonitor International and Kore Global (2023) Pathways to Gender-Inclusive Economic Development in Sub-Saharan Africa: A Sectoral Analysis (2023)

Euromonitor International would like to thank Kore Global, for partnering with us in the writing and finalisation of this report.

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

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

These include:

- The Pathways Study Steering Committee (SC) which provided financial and/or technical support for the Pathways project including: United States Agency for International Development (USAID), International Cooperative Research Group (ICRG) - the research branch of the United States Overseas Cooperative Development Council (U.S. OCDC), Mastercard Foundation, International Development Research Centre (IDRC), United Nations Entity for Gender Equality and the Empowerment of Women (UN Women), United Nations Economic Commission for Africa (UN ECA) and Euromonitor International. SC partners also provided directional advice guidance in the making of key decisions, supported by making referrals and connections with key country stakeholders and also reviewed draft reports.
- Kore Global, a women-led gender equality and social inclusion consulting firm, supported with the finalisation of the country reports. The team included women's economic empowerment experts Rebecca Calder, Jenny Holden, Federica Busiello and Divya Hariharan who co-wrote the final report.
- Independent staff of the Centre for Gender Studies (CGS), University of Rwanda that supported the on-ground research and preliminary report writing: Dr Josephine Mukabera, Dr Celestin Hategekimana and Dr Innocent Iyakaremye.
- Country Working Group members including Jean de Dieu Ndacyayisenga (UN Women), Theogene Nkuranga (PACT International, Rwanda), Alice Uwingabiye (Land O'Lakes Venture37), Tona Isibo (Mastercard Foundation), Antoine Niyitegeka (Ministry of Gender and Family Promotion - MIGEPROF) and Prof Alfred Bizoza (University of Rwanda).
- Experts (Gender and Thematic) who reviewed and/or contributed to the report: Andria Hayes-Birchler, Greg Meenahan and Harriet Odembi Gayi.

We would also like to thank the research participants who engaged with us throughout this study. This work would not be possible without the support of those who took the time to share their professional and sometimes personal experiences. While our work can never do justice to the multitude of voices of women (and men) working on gender equality, we hope that this report stays true to the spirit of your responses.

We are keen for the findings of the Pathways Study to guide research, policy development and implementation, programming (planning and execution) and advocacy efforts - creating a unified voice, clear(er) direction and sustainable action for improved women's economic empowerment in Rwanda.

Pathways Study Steering Committee

AAR	ActionAid Rwanda
ACORD	Agency for Cooperation and Research in Development
AEE	African Evangelistic Enterprise
AFIDEP	African Institute for Development Policy
ATPC	African Trade Policy Centre
BDF	Business Development Fund
CGS	Centre for Gender Studies
CIDA	Canada International Development Agency
COCAGI	Co-operative des Caféicultureurs de Gishoma
CPC	Community Processing Centre
CSO	Civil Society Organisation
CTC	Cut, Tear, Curl
CWS	Coffee Washing Station
DHS	Demographic and Health Survey
DRC	Democratic Republic of Congo
EAC	East African Community
ECD	Early Childhood Development
ETP	Ethical Tea Partnership
FDI	Foreign Direct Investment
FTE	Full-Time Employees
FFRP	Forum des Femmes Rwandaises Parlementaires
FLFP	Female Labour Force Participation
FVA	Faith Victory Association
GBV	Gender-Based Violence
GDP	Gross Domestic Product
GGCRS	Green Growth and Climate Resilience Strategy
GI-ESCR	Global Initiative for Economic, Social and Cultural Rights
GMO	Gender Monitoring Office
GVA	Gross Value Added
HDI	Human Development Index
ICRG	International Cooperative Research Group
ICRW	International Center for Research on Women
IDH	Sustainable Trade Initiative
IDLO	International Development Law Organization
IDRC	International Development Research Centre
IFAD	International Fund for Agricultural Development
IMF	International Monetary Fund
INA	Initiative for Sustainable Agricultural Supply Chains
IPV	Intimate Partner Violence
LACEA	Leather Apex Consortium of East Africa
LTR	Land Tenure Regularisation
LTRP	Land Tenure Regularisation Programme
MGW	Minimum Guaranteed Wage
MIGEPROF	Ministry of Gender and Family Promotion
MINAGRI	Ministry of Agriculture and Animal Resources
MINECOFIN	Ministry of Finance and Economic Planning
MINICOM	Ministry of Trade and Industry
NAEB	National Agricultural Export Development Board
NAPA	National Adaptation Programme of Action
NCCR	National Cooperative Confederation of Rwanda
NGO	Non-Governmental Organisation
NST1	National Strategy for Transformation
NUDOR	National Union of Disabilities' Organisations of Rwanda
NWC	National Women's Council

OCIR CAFÉ	Rwanda Coffee Development Authority
OEC	The Observatory of Economic Complexity
OHCHR	Office of the High Commissioner for Human Rights
PSTA	Strategic Plan for Agriculture Transformation
PTSC	Postharvest Training and Services Centres
RAB	Rwanda Agriculture and Animal Resources Development Board
RAPROLEP	Rwandese Association for the Promotion of Leather and Leather Products
RCA	Rwanda Cooperatives Agency
RCI	Relationship Coffee Institute
RCT	Randomised Controlled Trial
RCWE	Rwanda Chamber of Women Entrepreneurs
RISD	Rwanda Initiative for Sustainable Development
RLVCP	Rwanda Leather Value Chain Platform
RPF	Rwandan Patriotic Front
RMT	Rwanda Mountain Tea
RSB	Rwanda Standards Board
RWAMREC	Rwanda Men's Resource Centre
RWASHOSCCO	Rwanda Smallholder Specialty Coffee Company
RWF	Rwandan Francs
RWN	Rwanda Women's Network
SACCO	Savings and Credit Cooperative Organisation
SDG	Sustainable Development Goal
SILC	Savings and Internal Lending Communities
SME	Small and Medium Sized Enterprises
SRHR	Sexual and Reproductive Health Rights
SSA	Sub-Saharan Africa
ToT	Training of Trainers
TVET	Technical and Vocational Education and Training
UNABU	Rwandan Organisation of Women with Disabilities
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UN ECA	United Nations Economic Commission for Africa
UNFCCC	United Nations Framework Convention on Climate Change
UNHCR	United Nations High Commissioner for Refugees
USAID	United States Agency for International Development
U.S. OCDC	United States Overseas Cooperative Development Council
VAWG	Violence Against Women and Girls
VSLA	Village Savings and Loans Association
VUP	Vision 2020 Umurenge Programme
WASH	Water, Sanitation and Hygiene
WEE	Women's Economic Empowerment
WVE	Women's Vulnerable Employment
YWCA	Young Women Christian Association

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

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

Key term	Definition
Social capital (vertical and horizontal)	Social capital refers to the institutions, relationships and norms that shape the quality and quantity of an individual and society's social interactions. It includes both vertical and horizontal[1] associations between people, and includes behaviour within and among organisations, such as firms. This view recognises that horizontal ties are needed to give communities a sense of identity and common purpose, but also stresses that without "bridging" ties that transcend various social divides (e.g. religion, ethnicity, socioeconomic status), horizontal ties can become a basis for the pursuit of narrow interests, and can actively preclude access to information and material resources that would otherwise be of great assistance to the community (e.g. tips about job vacancies, access to credit). Source: World Bank Cooperatives have a social network that combines both horizontal and vertical social ties. Horizontal ties represent the social relationships and interactions between cooperative members while vertical ties are the social connections between cooperative members and parties such as off-takers, processors/buyers etc. Source: Deng et al (2020)
Unpaid care and domestic work	Refers to care of persons and housework performed within households without pay, and unpaid community work. Source: OECD

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

Key term	Definition
Violence against women and girls (VAWG)	Violence against women and girls is any act of gender-based violence that results in, or is likely to result in, physical, sexual or mental harm or suffering to women and girls, including threats of such acts, coercion or arbitrary deprivation of liberty, whether occurring in public or in private life. Violence against women and girls encompasses, but is not limited to, physical, sexual and psychological violence occurring in the family or within the general community. Source: UN Women
Women's economic empowerment (WEE)	Women having the ability to succeed and advance economically, and the power to make and act on economic decisions to enhance their broader wellbeing and position in society. Source: Calder et al., (2020)
Women's vulnerable employment (WVE)	Women's vulnerable employment is contributing female family workers and own-account workers as a percentage of total employment. It is derived using data from the International Labour Organization, ILOSTAT database. Source: World Bank

Executive summary

Women's economic empowerment (WEE) is central to Rwanda's plan to become a middle-income country by 2035, and to achieving sustained growth and transformation for all Rwandans.[2] Women have anchored Rwanda's workforce and economic growth since the 1994 Genocide against the Tutsi, and the country has made significant strides towards achieving greater gender equality. Global gender indices show consistent improvements across women's education status, wage equality, and political participation and representation, with Rwanda having closed at least 80% of its gender gaps in these areas.[3]

2. Republic of Rwanda (2017)
3. World Economic Forum (2022). Global Gender Gap report 2022 - Insight Report

However, gender inequalities in access to secondary and higher education, literacy levels, sexual and reproductive health (SRH) outcomes, and gender-based violence (GBV) continue to hinder women's overall economic potential and wellbeing. Consequently, unemployment, underemployment and youth unemployment remain considerably higher for women than men.[4] In addition, women predominantly work in the informal sector where they lack sufficient legal protection,[5] and they are much less likely to hold higher-paying managerial positions.[6] Women with disabilities, younger women and widows are particularly vulnerable to gender-based discrimination and exclusion.

The COVID-19 pandemic and climate change are threats to Rwanda's progress on gender equality and women's labour force participation. Since Rwandan women are overrepresented in daily wage jobs, female-headed households remain at a greater risk of falling into deeper poverty levels.[7] Furthermore, women are highly dependent on natural resources which are threatened by climate change including firewood used for cooking. With nearly 80% of women being employed in agriculture and dependent on subsistence agriculture, women are particularly vulnerable to climate stressors such as drought and floods leading to loss of income and increased risk of hunger, malnutrition and other health risks.[8]

As Rwanda recovers from the impact of the COVID-19 pandemic on the economy and society, investing in economic opportunities for women and girls through interventions in the market is critical. From differentiation of women's coffee, increasing skills in value-added green (French) beans processing and value addition for women's cooperatives, to supporting women entrepreneurs working in leather processing (tanning) or final product manufacturing, every sector offers opportunities to improve women's livelihoods and wellbeing. For efforts to economically empower women to be successful, interventions must also address barriers within the enabling environment, including tackling harmful social norms that hinder women's ability to benefit equally from and contribute to the Rwandan economy and society.

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

4. International Development Research Centre (IDRC), Euromonitor International (2020)
5. Euromonitor International (2020)
6. International Development Research Centre (IDRC), Euromonitor International (2020)
7. United Nations Rwanda (2020) 8. Twahirwa, M (2022)

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

The report identifies key factors at each of these levels with relevance to all sectors. In addition, the report presents specific findings related to two broad sectors (including three sub-sectors in agriculture) selected in consultation with country-level stakeholders: (i) Agriculture (Coffee/Tea, Green (French) Beans, Fishing/Aquaculture); and (ii) Leather and Leather Products.

Part of a series of reports commissioned on Sub-Saharan Africa, the report aims to provide practical recommendations for public and private sector partners to consider that would improve and expand women's economic opportunities and contribute meaningfully to women's economic empowerment.

Key findings – Sectoral analysis

The sectoral analysis identified key trends related to women's engagement in coffee and tea, green (French) beans, fishing and aquaculture, and leather and leather products. In each of these sub-sectors, women face barriers to economic empowerment, though opportunities and entry points for further empowerment also exist across structural, normative and individual factors.

Highlights are summarised below with a detailed explanation of the cross-cutting/contextual structural, normative and individual factors in section 4 and deeper sector-specific analysis of these factors provided in section 5 of the report. Appendix 3 offers a cross-sectoral table summary of the barriers and opportunities and entry points.

Structural factors

Rwanda continues to reform its laws to ensure greater gender equity. Gender and family promotion have been mainstreamed as a key cross-cutting issue to achieving sustainable growth and transformation under the National Strategy for Transformation (NST1) (2017-2024). Focus areas include facilitating women's access to finance, mainstreaming gender in employment and job creation strategies, strengthening

gender capacity, tools and data, as well as strengthening GBV prevention and response efforts. Significant steps have been taken to integrate gender budgeting within public financial management, with gender budgeting mandatory across all budget statements, and now rolled out to the entire national government and district level. Priority areas of the Revised National Gender Policy (2021) include: engendering national planning frameworks and policies; accelerating women's economic empowerment; promoting gender equality and equity in education, health and social protection; supporting best practices for gender promotion; engaging men and boys to address inequitable household division of labour; increasing women's participation and leadership in decision-making positions; enhancing gender capacity development; and integrating gender equality within legal frameworks.[9]

Complementary legal frameworks offer protection for women workers. This includes legal provisions addressing sexual harassment in the workplace, gender-based workplace discrimination and maternity pay and benefits. However, there remain some critical gaps in legislation including no law mandating equal pay for equal work and no provision for gender discrimination in access to credit. Furthermore, marital laws privilege men as heads of the household, while limiting women's ability to make autonomous decisions. There is a gap in Rwandan legal frameworks in relation to the protection of property rights of women in informal/consensual marriages. Despite formal legal provisions, customary law continues to discriminate against women in key issues affecting economic empowerment including land rights and ownership, with significant implications for gender-inclusive economic development. There are also implementation gaps, with the informal workforce largely excluded from legal protection, and insufficient monitoring and regulation of existing labour law provisions.

Normative factors

Social norms around women's unpaid and domestic work duties significantly hinder economic opportunities outside of the household, as well as their broader wellbeing. Gender norms and inequitable attitudes also affect the division of labour among smallholder families. Men's traditional roles as economic providers and decision-making authorities in the household, hinder WEE outcomes and contribute to and underpin high rates of intimate partner violence (IPV).[10]

9. Ministry of Gender & Family Promotion (MIGEPROF) 2021
10. Stern, E., Heise, L.., & McLean, L. (2018)

Rwanda is a celebrated global leader in terms of women's participation in politics, but substantive changes in women's empowerment outcomes at the grassroots is yet to be fully realised.[11] A lack of women's adequate representation at local/community levels hinders effective implementation of gender policies due to resistance driven by entrenched patriarchal norms.[12] At the household and community level, women continue to lack decision-making authority due to multiple individual factors (such as lower educational levels, lack of confidence and self-esteem, limited access to assets), as well as normative barriers (such as patriarchal norms and women's unpaid care burden leaving little time for women to engage in local level politics). Consequently, traditional gender norms have not changed dramatically, despite widespread representation of women in national leadership positions.[13]

Individual factors

Rwanda has made significant progress in enabling girls' access to education since the early 2000s, achieving near universal primary school enrolment. However, women and girls' access to and retention in higher education levels remains a challenge. Limited technical or business training opportunities mean many women remain concentrated in informal SMEs, or at lower levels of value chains.

Village savings and loans associations (VSLAs), of which about 77% members are women,[14] offer women opportunities to build their social and economic capital. However, unless coupled with gender-transformative interventions at the household level, women's membership in VSLAs can remain constrained by patriarchal norms.

Limited access to finance constrains women's ability to invest, or expand their businesses. Female-headed households have on average plot sizes 10.5% smaller than their male counterparts. While many married women have gained strengthened land rights, thanks to the Land Tenure Regularisation Programme (LTRP), the same cannot be said for widows, women in unofficial marriages and women in polygamous partnerships with men. Therefore, many women continue to lack access to the collateral (land and other assets) they need to access financial services to grow their businesses.[15]

Implications and recommendations

Based on the key findings, a number of practical recommendations and considerations are aimed at donors, policy makers, community leaders, programmers and researchers - including those engaged in WEE-focused programmes and initiatives, as well as those involved in more general economic development programming

11. USAID (2011) 12. Abbott, P., & Malunda, D. (2016) 13. USAID (2011) 14. Women Connect (n.d.) 15. MINAGRI (2018)

which may not have women's economic empowerment as a central aim.

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

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

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

A number of practical recommendations can be drawn from the report's key findings:

Policy recommendations

1. Address key policy gaps and improve implementation and monitoring of key policies and programmes around women's land ownership, girls' education, and GBV prevention and response.
2. Undertake community-level sensitisation, capacity building and advocacy around existing legislation to strengthen women's rights.
3. Advocate to remove gender-based barriers to finance and promote women-friendly financial services and products.

Programming recommendations[16]

1. All programming should be based on a robust gender analysis which identifies risks and mitigating measures at each level of the change pathway. This is an essential part of good programming for all types of programmes, including those that may not have gender or women's economic empowerment as a core area of focus.
2. Programmes should also adopt gender transformative approaches/models that foster women's active engagement with and influence of gender norms within their communities. Such approaches should support women navigating their way into positions of influence that enable them address imbalances between men and women in their communities.
3. Assess and address women's and girls' unpaid care and domestic work burden so that they can complete their education, acquire marketable skills and work for pay outside the household.

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

4. Strengthen cooperative business to provide opportunities for women members to participate in cooperative leadership and governance to enable women's collectives to build social, human and economic capital, and tackle normative barriers.
5. Work with women and girls holistically to improve their human, social and economic capital and wellbeing.
6. Work with large employers to promote gender-sensitive and safe workplaces.
7. Address inequitable intra-household dynamics and norms, including strengthening GBV prevention and response.
8. Strengthen private sector engagement.

Research, monitoring and evaluation

1. Commission and undertake research to address research gaps including marginalised groups of women to understand the different barriers that women face.
2. Include measures of key factors enabling or constraining women's economic empowerment. These should include gender-specific measures focused on women's capabilities and agency, household relations and gender norms and attitudes.
3. At a minimum, disaggregate results by sex and include sex disaggregated targets. Wherever possible, programmes and research should further disaggregate by other socioeconomic characteristics including income, age, race, disability, migratory status and geographic location.
4. Commission mixed-method research and evaluations on these issues to understand how and why change happens, and to better understand women's lived realities through participatory qualitative research, and theory-based evaluations.
5. Monitor, track and mitigate against any signs of potential backlash during programme implementation, including increased rates of gender-based violence (GBV).

Source: U.S. Agency for International Development (USAID) – Carielle Doe, Photographer

1. Introduction

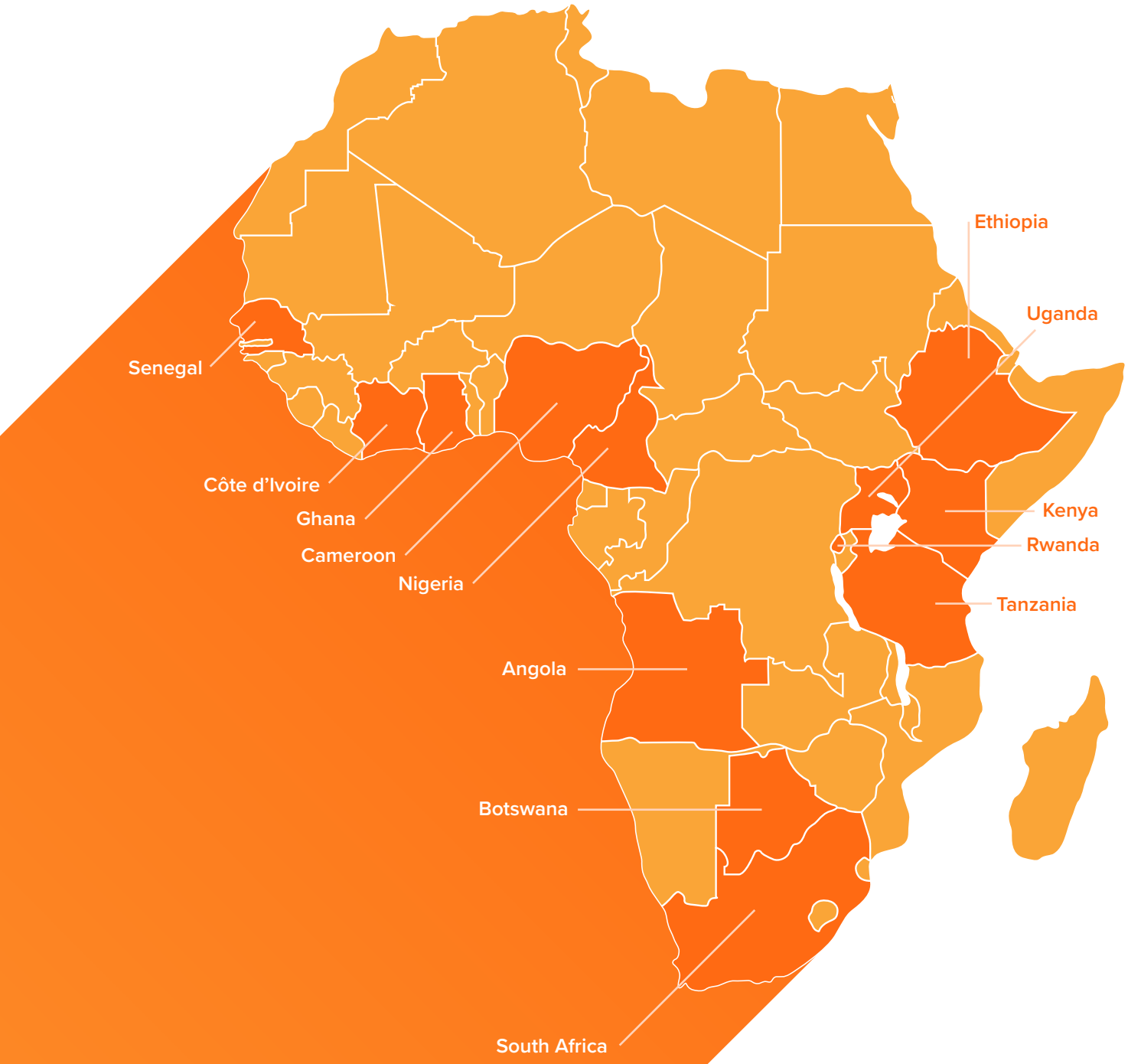
Background and objectives

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

Euromonitor International in partnership with six other global organisations: (i) International Cooperative Research Group (ICRG), which is the research arm of the United States Overseas Cooperative Development Council (U.S. OCDC); (ii) United States Agency for International Development (USAID); (iii) Mastercard Foundation; (iv) International Development Research Centre (IDRC); (v) United Nations Entity for Gender Equality and the Empowerment of Women (UN Women); and (vi) the African Trade Policy Centre (ATPC), which is a specialised unit within the United Nations Economic Commission for Africa (UN ECA)[17] (the Steering Committee) launched the Pathways Study in 2020. The aim was to assess which sectors hold the highest potential for women's economic empowerment, explore how women's prospects in these sectors can be strengthened in light of various barriers and drivers, and identify which stakeholders (public and private) are key to achieve this.

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

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



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

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

1. **Identifying the sectors with the most potential**
   - Which sectors are forecast to grow fastest over 2020-2030?
   - Which sectors have the greatest prospects for women's economic empowerment?
   - Which sectors would benefit the most from improved economic participation of women?
2. **Understanding the challenges and drivers for women's opportunities in key sectors**
   - What is the role of women within priority sectors and what are their prospects for expanded opportunities?
   - What are the sector-specific drivers and barriers for women's employment, entrepreneurship and advancement?
   - What works to improve/leverage these drivers and overcome these barriers?
3. **Developing sector-specific solutions**
   - What are the actionable and sector-specific solutions, tailored to each country's/sector's context?
   - Which stakeholders are well positioned to implement or advocate for these solutions?

Methodology summary

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

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

1. Scoping Study and Modelling

Preliminary research and economic modelling

Euromonitor International Research and Analytics Team

2. Selection of 2-3 Focus Sectors

Sector Prioritisation Workshop

Country Working Group Participants,

Independent Staff of Centre for Gender Studies (CGS), University of Rwanda

3. Stakeholder Mapping

Secondary Research and Interviews

Independent Staff of Centre for Gender Studies (CGS), University of Rwanda (Country Partner)

4. Sector Deep Dives – Primary and Secondary Research

Secondary Research and Interviews

Independent Staff of Centre for Gender Studies (CGS), University of Rwanda (Country Partner)

5. Analysis of Findings

Qualitative Analysis, Report Writing

Independent Staff of Centre for Gender Studies (CGS), University of Rwanda (Country Partner), Euromonitor International Analysts, Kore Global

6. Report Finalisation

Recommendations Workshop, Expert Reviews

Country Working Group Participants, Independent Staff of Centre for Gender Studies (CGS), University of Rwanda (Country Partner), Euromonitor International Analysts, Kore Global, Thematic and Sector Experts, Steering Committee

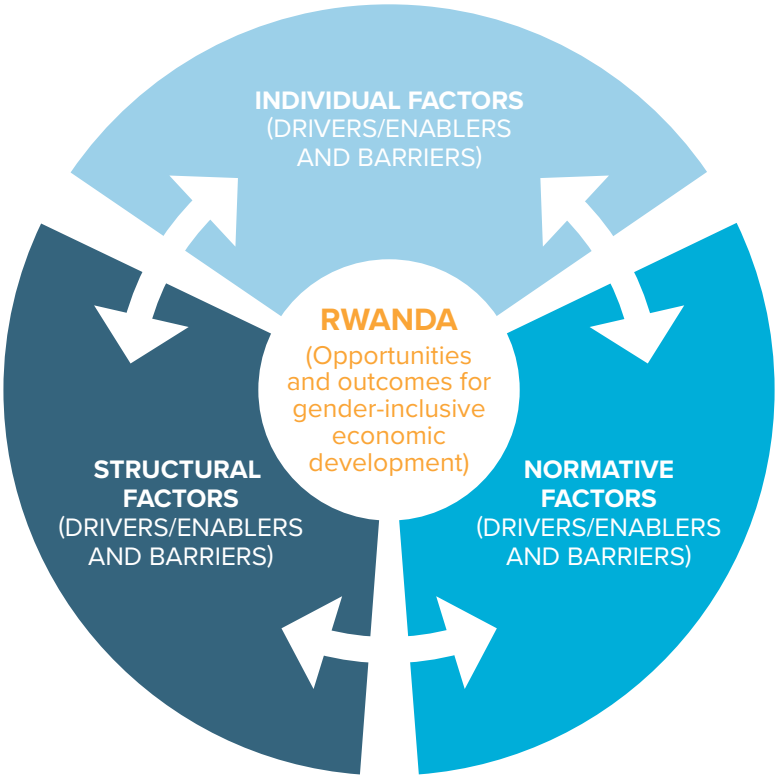
2. Conceptual framework for understanding women's economic empowerment

Women's economic empowerment (WEE) can be understood as: "Women having the ability to succeed and advance economically, and the power to make and act on economic decisions to enhance their broader wellbeing and position in society."[18]

Women's economic empowerment is much broader than labour market participation.[19] It involves both women's acquisition of resources and the exercise of power and agency in all economic domains and market-related interactions.[20] It recognises that individual women operate within contexts of both informal (normative) and formal (structural) barriers and enablers.[21] And, as a result, women's economic empowerment is highly context-specific both in terms of women's aspirations and the enablers and barriers that they experience.[22]

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

Conceptual framework for understanding women's economic empowerment



This report applies a holistic framework to understand barriers and enablers to women's economic empowerment in Rwanda at three distinct levels: (i) Structural; (ii) Normative; and (iii) Individual.

Factors at these three levels combine and interact to influence women's economic empowerment opportunities and outcomes. For example, barriers at different levels can interact to limit women's opportunities to collectively engage in and shape market institutions; their access to suitable services and assets; and their choices relative to men's, thereby leading to greater engagement in marginal, unregulated and precarious forms of work with low and unstable earnings, and no social protection. Segregation and discrimination can occur along several fronts - employment, status in value chains, profit potential and level of risk - and is stubbornly persistent in informal labour markets despite low barriers to entry. All these due to the vicious interplay between individual, normative and structural constraints.

Structural factors

Government policies, laws and regulations - whether formulated at the national or sub-national level - create a structure that directly or indirectly constrains women's participation in the economy. Macro-level economic policies are often thought of as "gender neutral", as they cover policy areas such as public and private investment, macroeconomic stability, rules for international trade, financial regulatory powers and policies, and public expenditure allocation and management. In most cases, these policies are not designed with WEE outcomes in mind, but they affect women and men differently because of their different positions in the economy and society, shaped and reinforced by existing gender norms.

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

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

Policies can also indirectly influence women's economic empowerment. These may include:

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

Normative factors

Gender norms circumscribe women's capabilities well before they enter the labour market, as norms affect the whole skill development process of children and youth; for example, how much and what kind of education and other learning opportunities are made available.[23] Norms invest dominant household members, usually men, with the authority to determine how resources are allocated and how women and girls use their time.[24] The role of gender norms and relational agency is thus important to examine as a factor enabling or constraining women's economic outcomes.

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

23. Calder et al. (2021)
24. Kabeer (2021)

Norms play an important role in explaining many labour market phenomena, such as persistent gender segregation, low or declining female labour force participation (FLFP), women's lower returns to human capital and experience in the world of work, women's double burden of paid and unpaid work, household decision making, the aspirations of women and girls,[25] and the availability of relevant products and services for women in the market (for example, financial products and services, good quality affordable childcare, and private/domestic infrastructure). These gendered norms focus on five key areas:

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

Individual capital factors

Capital can be embedded in human beings (**human capital**), **embedded in society** (**social capital**), **or possessed in the form of a tangible asset, by an individual, a household, or a group** (**economic capital**). Capital is especially important for women entrepreneurs to navigate the "structures of constraint" they face in doing business. Yet evidence suggests that women suffer capital deficits relative to men, and that this affects their performance.[26]

Human capital includes: business, entrepreneurial, vocational, and sectoral information, knowledge and skills, and an understanding of rights, key policies and regulations; basic cognitive skills such as literacy and numeracy; financial and digital skills; and social-emotional skills such as aspiration, self-esteem, goal setting and communication. Uneven investments in girls' and young women's human capital create pre-existing constraints that are exacerbated through unequal access to market services, opportunities, and economic and social capital.[27]

25. Marcus (2021)
26. McKenzie et al. (2021); Batista et al. (2021)
27. Calder et al. (2021)

The exercise of individual choice is significantly enabled by stores of social capital. Social capital refers to networks, rooted in norms and social trust, that facilitate coordination and cooperation for mutual benefit, that are informed by long-standing values of solidarity and mutuality.[28] Women are often further constrained by their disproportionate reliance on horizontal social networks - connections and relations between those in similar socioeconomic situations - as compared to vertical networks with people of different socioeconomic standing. However, horizontal social capital can be valuable to women insofar as it enables them to join with others in collective action, for example through collective enterprises.

Finally, economic empowerment requires women to access and control economic capital, including: financial assets such as earnings, savings, and investments; productive assets such as business equipment (including phones), inventory and inputs, livestock, and land; and private/domestic infrastructure assets such as fuel-efficient stoves, durable housing and solar power that increase women's ability to engage in paid work.[29]

Given an enabling environment, these interlinked forms of capital support women to exercise greater choice and agency in relation to their work. Therefore, the lack of capital is more of a problem for women: firstly, because systemic and structural constraints allocate more opportunities to build capital to men; and secondly, because women need more capital than men simply to overcome structural constraints and engage in markets productively and profitably.[30]

28. Adato and Hoddinott (2008) in Calder and Tanhchareun (2014)
29. Calder et al. (2021)
30. Calder et al. (2021)

Source: U.S. Agency for International Development (USAID) – Karin Bridger, Photographer

3. Country context

3.1 Demographics, geography and politics

The Republic of Rwanda is a landlocked country in the Great Rift Valley, bordered by Uganda, Tanzania, Burundi and the Democratic Republic of the Congo (DRC).[31] Rwanda has a total area of 26,338km^2 (10,169.2 square miles), inclusive of water bodies.[32] Given its high elevation, it is often referred to as the "land of the thousand hills". The country's capital is Kigali, located in the centre.[33]

31. Clay, D., & Lemarchand, R. (2021)
32. World Bank Databank (n.d.) https://data.worldbank.org/indicator/AG.LND.TOTL.K2?locations=RW
33. Clay, D., & Lemarchand, R. (2021)

Source: U.S. Agency for International Development (USAID) – Bobby Neptune/USAID, Photographer

More than four out of five people live in rural areas (82.5%)[34] and only 17.4%[35] live in urban areas. Urban population growth has slowly risen in the last decade and currently stands at 3.2%,[36] while the overall population growth rate is 2.5% which is the average for the SSA region.[37] Rwanda is the most densely populated country on mainland Africa, and it is projected that by 2032, the population could be as high as 16.9 million, resulting in more than 645 inhabitants per square kilometre.[38] With a projected population of 12.9 million in 2021[39] and nearly 60% of its people below the age of 24, Rwanda's population is among the smallest and youngest countries in Sub-Saharan Africa.[40] With a median age of 20.2 years,[41] Rwanda has one the youngest populations globally, because of rapid population growth, a fertility rate of 3.9 as at 2020[42], plus steadily declining mortality rates.[43] Female-headed households represent a considerable 41% of all Rwandan households,[44] of which most are widows (63%), and over a third are over the age of 60 (34%).[45]

According to Rwanda's National Census (2012), among those aged over five years, there were almost 446,453 persons with disabilities.[46] However, it should be noted that the actual number may be significantly higher as the surveys used for data capture did not use questions designed to identify children with disabilities.[47] Disability in Rwanda results in limited access to education and employment, and an increased likelihood of living in poverty.[48] Although under-researched, women with disabilities, especially in rural settings, are likely to experience multiple forms of discrimination.[49]

Over the last 25 years, Rwanda has experienced fluctuations in its migration flows, with net migration ranging from 1.2+ million migrants in 1997 to a net negative figure of -44,998 in 2017.[50] With an estimated net migration rate (2022) of -3.21 migrants/1,000 population, employment and education remain the key drivers of internal migration.[51] Additional factors include inter-regional disparity, uneven economic development, and differences in standards of living in urban and rural areas.[52] The main destinations remain the city of Kigali (33%), and the Eastern Province (14%).[53] Approximately, 52.2% of internal migrants of working age (16 years old and over) are women.[54]

34. World Bank Databank (n.d.) https://data.worldbank.org/indicator/SP.RUR.TOTL.ZS?locations=RW
35. World Bank Databank (n.d.) https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS?locations=RW
36. World Bank Databank (n.d.) https://data.worldbank.org/indicator/SP.URB.GROW?locations=RW
37. World Bank Databank (n.d.) https://data.worldbank.org/indicator/SP.POP.GROW?locations=RW
38. National Institute of Statistics of Rwanda (NISR), (2014a) 39. National Institute of Statistics of Rwanda (NISR), accessed 12 July 2022. Projected size of resident population: 12,955,736 40. CIA World Factbook (2021a) 41. Euromonitor International Passport (2022)
42. Republic of Rwanda (2020) 43. African Institute for Development Policy (AFIDEP), & University of Southampton. (n.d.) 44. Euromonitor International (2020) 45. National Institute of Statistics of Rwanda (NISR), (2018a) 46. National Institute of Statistics of Rwanda (NISR), (2014b)
47. Kidd, S., & Kabare, K. (2019) 48. National Union of Disabilities' Organisations of Rwanda (NUDOR) (n.d.) 49. Rwandan Organisation of Women with Disabilities (UNABU), Human Rights First Rwanda Association, & Uwezo Youth Empowerment. (n.d.). 50. Migrants Refugees (2021) 51. Migrants Refugees (2021 52. Musabanganji, E., Ruranga, C., & Maniriho, A. (2019) 53. Migrants Refugees (2021)
54. Vital, H., & Jean de Dieu, D. (n.d.)

Rwanda saw an increase in international migration from the early 1990s (160,000 in 1990) to late-2010s (539,900 in 2019).[55] International migrants in the country constituted 4.3% of the population (2019).[56] The majority of immigrants are from the Democratic Republic of the Congo (250,000), followed by Burundi (150,000), Uganda (100,000) and Tanzania (50,000).[57] The total numbers of male and female international migrants are estimated to be equal.[58]

Rwanda experienced a major exodus during the 1994 genocide against the Tutsi, and up to 1997.[59] Since then, it has become a receiving country, hosting refugees and coordinating response efforts with the United Nations High Commissioner for Refugees (UNHCR). Refugee camps have been set up in Mahama, Nyabiheke, Gihembe, Kiziba, Mugombwa and Karongi, and four transit centres in the Nkamira, Nyanza, Bugesera and Gatore districts.[60] In 2020, Rwanda welcomed 142,949[61] refugees and 338 asylum-seekers[62] from 10 countries with most coming from the Democratic Republic of the Congo (74,083) and Burundi (68,887).[63] Just over half (51%) of the refugee population are women.[64]

Climate change and susceptibility to natural disasters has imposed heavy costs on Rwanda and Rwandans, especially as population growth and land scarcity push people to settle in flood-prone areas.[65] Rwanda is characterised by mountainous terrain and a temperate climate resulting in strong seasonality and high inter-annual variability.[66] The fluctuations and limited historic data make it difficult to discern climate trends. However, an increase of 0.3 degrees Celsius per decade since the mid-1980s to 2015s has been recorded.[67] Continued changes to the temperature may result in compounded ramifications associated with rainfall, floods and droughts, potentially undermining food security, health and economic growth.[68]

Agriculture alone accounts for more than 30% of the country's gross domestic product (GDP) and employs close to 70% of the population.[69] With most of farming households relying on rainfed cultivation, erratic rainfall patterns will continue to impact agricultural infrastructure growth, increase postharvest losses, and limit access to input resources and finance. Temperature-sensitive crops such as tea and coffee, though significant export commodities, are being forced to shift to less arable land on high elevation because of rising temperatures.[70]

55. Migration Data Portal (n.d.) 56. UN DESA (2019) 57. UN DESA (2019) 58. UN DESA (2019) 59. Migrants Refugees (2021)
60. Migrants Refugees (2021) 61. UNHCR (2020) 62. UNHCR (2020) 63. UNHCR (2020) 64. UNHCR (2022) 65. World Bank (2021c)
66. USAID (2019) 67. USAID (2019) 68. USAID (2012) 69. USAID (2019) 70. USAID (2019)

The rainfall uncertainties have also resulted in increased pest and disease incidences in crops and livestock.[71]

With increasing occurrences of floods, heavy rainfall and unexpected droughts, the country's water resources have also experienced climate stressors and risks. Increased flooding has threatened water infrastructure and quality.[72] There has been an increase in internal displacement within the country as a result.[73] Alternatively, in areas experiencing longer dry spells, there is risk of water contamination, especially of rivers flowing through the country. Several geographies are additionally susceptible to waterborne diseases such as malaria, a leading cause of death in Rwanda.[74] Despite impressive progress to reduce the risk of malaria in recent years, a possible wetter climate will expand the transmission of malaria, potentially increasing incidence by up to 150% by 2050.[75]

With nearly 80% of women being employed in agriculture and/or dependent on subsistence agriculture, they are extremely vulnerable to the effects of extreme weather conditions including droughts and flooding.[76] As well as the economic impact this has on women and their households, this dependence on subsistence agriculture risks hunger, malnutrition and other health risks at times of climate shocks. Furthermore, women are highly dependent on natural resources which is threatened by climate change including firewood used for cooking.[77]

As a response, the government of Rwanda has undertaken several major climate mitigation and adaptation policy initiatives. Rwanda was the first African country to submit its revised Nationally Determined Contributions regarding the Paris Agreement on Climate.[78] In addition, the government ratified the United Nations Framework Convention on Climate Change (UNFCCC) in 1992, developed a National Adaptation Programme of Action (NAPA) in 2000, and adopted a green growth and climate resilience strategy (GGCRS) in 2011.[79]

3.2 Human development

Rwanda is ranked 160 out of 189 countries and territories as per the Human Development Report Index (HDI), 2020.[80] With an index value of 0.543, the country is positioned in the "low human development" category.[81] However, it is worth noting that the HDI value of the country increased from 0.248 in 1990 to 0.543 in 2019, an increase of 119.0%.[82] Measured against the national poverty line of RWF159,375 per year (around USD156), absolute poverty levels have declined from 45% in 2010/2011 to 38% in 2016/2017.[83] The improvement is partly explained by better and increased access to

71. USAID (2019) 72. USAID (2019) 73. Migrants Refugees (2021) 74. USAID (2019) 75. USAID (2019) 76. Twahirwa, M. (2022)
77. Twahirwa, M. (2022) 78. Twahirwa, M. (2022) 79. Twahirwa, M. (2022) 80. United Nations Development Programme (UNDP) 2020
81. United Nations Development Programme (UNDP) 2020 82. United Nations Development Programme (UNDP) 2020
83. National Institute of Statistics of Rwanda (NISR), (2018b)

social protection services and productive resources such as land.[84] The government has also adopted an expansionary fiscal policy to reduce poverty by strengthening education, infrastructure, and foreign and domestic investment opportunities. Among adult women and girls, over a third (nearly 34.8%) continue to live below the national poverty line compared to 31.6% of men, while 44.8% of girls and 44.2% of boys are living in poverty.[85]

Women have anchored Rwanda's workforce growth and economy since the 1994 genocide against the Tutsi. In the 2022 World Economic Forum's Global Gender Gap Report, Rwanda (ranked 6th globally, 1st in SSA), was one of two Sub-Saharan African countries to rank among the top 10 globally (the other was Namibia).[86] Rwanda registered parity in labour force participation, with women's score (82.5%) just slightly higher than men's at 82.23%.[87] However, the share of informal sector workers (as at 2021) was 83.4% for women compared to 77.6% for men.[88] Also, the gender pay gap is considerably smaller in Rwanda than most markets, with women making 88 cents on the dollar compared with men.[89] Rwanda stands out with above-average scores on most gender equality indices. Of 35 countries in the SSA region, Rwanda is one of two countries (besides Namibia) to have closed at least 80% of its gender gaps.[90]

84. Gender Monitoring Office (GMO) (2019)
85. Gender Monitoring Office (GMO) (2019) citing NISR, EICV 5- Poverty Profile Report, 2016/17. National Institute of Statistics of Rwanda, Kigali, Rwanda
86. World Economic Forum (2022). Global Gender Gap Report 2022 - Insight Report
87. World Economic Forum (2022). Global Gender Gap Report 2022 - Insight Report
88. World Economic Forum (2021). Global Gender Gap Report 2021 - Insight Report
89. International Development Research Centre, Euromonitor International (2020)
90. World Economic Forum (2022). Global Gender Gap Report 2022 - Insight Report

Global gender indices for Rwanda show consistent improvements across women's education status, wage equality, and political participation and representation. (See table below)

Index	Score	Insights on score
Africa Gender Index (2019) Composite measure of parity between men and women across three dimensions (Economic, Social and Empowerment/ Representation) *(closer value to 1 indicates less inequality; score of 1 implies parity between men and women)* **Africa average: 0.486 |** **East Africa average 0.518**[91]	0.761	Dimensional scores include: Economic (0.662); Social (1.064); and Empowerment/ Representation (0.626). Rwanda has one of the lowest gender gaps in science, technology, engineering and mathematics (STEM).
Gender Inequality Index (2019) Composite measure reflecting inequality in reproductive health, empowerment and labour *(lower score is better)* **Global average: 0.436 |** **SSA average: 0.570**[92]	0.402	Rwanda's score has improved in every iteration of this Index since 1995.
Global Gender Gap Report (2022) Economic participation and opportunity, educational attainment, health and survival, and political empowerment. *(higher score is better)* **Global average: 0.681 |** **SSA average: 0.679**[93]	0.811	Rwanda ranks 6th in the world and 1st in SSA, driven by extremely high scores in women in parliament and ministerial positions, as well as gender parity in primary and secondary education, labour force participation, and wage equality for similar work. Rwanda registers its highest sub-index scores on Educational Attainment (0.96) and Health and Survival (0.974).

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

91. African Development Bank (AfDB) & UN ECA (2019)
92. United Nations Development Programme UNDP (n.d.)a
93. World Economic Forum (2022). Global Gender Gap Report 2022 - Insight Report

Index	Score	Insights on score
SDG Gender Index (2019) 14 of the 17 Sustainable Development Goals (SDGs) and 51 issues ranging from health, gender-based violence and climate change *(higher score is better)* **Global average: 67.8 | SSA average: 52.0**[94]	57.3	Although Rwanda ranks fifth in Sub-Saharan Africa, low scores on climate action, widespread inequality and high levels of poverty pull down its global ranking.
Gender Parity Score (2019) Measures distance from gender parity and takes into consideration gender equality at work and in society *(higher score is better)* **Africa average: 0.58**[95]	0.69	Average performance on gender equality at work (0.54), including high gender disparity in terms of unpaid care work (0.38) and formal employment (0.48).
Women, Business and the Law (2021) Measures legal regulations affecting women's economic opportunity via eight indicators: mobility, workplace, pay, marriage, parenthood, entrepreneurship, assets and pension *(higher score is better)* **Global average: 76.1 | SSA average: 71**[96]	80.6	Although Rwanda scores above the global average, it is penalised for its laws affecting women's work after having children (20/100). Specifically, dismissal of pregnant employees is not prohibited, paid parental leave and family leave are not available, and childcare is not subsidised by the government.

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

94. Equal Measures 2030 (2022) EM2030
95. McKinsey (2019)
96. World Bank (2021a) Women Business and the Law

Despite clear progress in reaching its gender equality goals, sexual and reproductive health (SRH) challenges affecting women's and girls' health and wellbeing persist. For example, for every 100,000 live births, 248 women die from pregnancy-related causes.[97] Prevailing negative religious beliefs and myths associated with family planning (such as the perception that modern methods cause infertility) have led to disempowered attitudes and skills to utilise SRH services.[98] The country's emphasis on following a "disease prevention model" as opposed to integrating comprehensive sexuality education measures has also made it difficult for women and girls to utilise SRH services effectively.[99] This model does not promote rights-based education; introduce policies on SRH; or include knowledge and communication activities - i.e. counselling for school children, sensitising the community on the needs of women and empowering parents to effectively respond to children's and adolescent's SRH needs.[100]

In 2019, over one in five Rwandan women had an unmet need for contraception.[101] Improvements in access, use and sustained adoption of modern contraceptives remains low, with an average family size of 4.6 children, compared with women's average desired size of 3.1 children.[102] Nearly 37% of the births in the country are unplanned, with provincial variations of 34% in the west and the north regions to 37-40% in Kigali city, the south and the east regions.[103] Adolescent pregnancies have increased from 6.3% in 2010 up to 7.3% in 2015.[104]

	Rwanda		SSA average	
Indicator	**Female**	**Male**	**Female**	**Male**
Literacy rate*, %	69.4	77.6	58.9	72.2
Enrolment in primary education, %	95.1	94.4	72.4	78.1
Enrolment in secondary education, %	38.8	32.9	40.6	45.9
Enrolment in tertiary education, %	6.0	7.5	8.2	10.7

Note: *Percentage of the adult population (over 15 years of age) of each gender with the ability to both read and write and make simple arithmetic calculations. Source: Global Gender Gap report (2021)

Approximately 3% of the population is living with HIV/AIDS. However, among key populations including female sex workers, rates are as high as 46%.[105] Virtually all Rwandan adults have heard of HIV/AIDS and 67% and 68% of women and men, respectively, have comprehensive knowledge on HIV/AIDS prevention and transmission.[106] Since the rise in HIV testing, the proportion of women who have ever been tested and received their results has increased from 76% in 2010 to 84% in 2014-2015.[107]

97. World Bank Databank (n.d.) https://data.worldbank.org/indicator/SH.STA.MMRT?locations=RW 98. Asiimwe, F. (2019)
99. Asiimwe, F. (2019) 100. Asiimwe, F. (2019) 101. USAID (2020)
102. Basinga, P., Moore, A. M., Singh, S., Remez, L., Birungi, F., & Nyirazinyoye, L. (2013)
103. Basinga, P., Moore, A. M., Singh, S., Remez, L., Birungi, F., & Nyirazinyoye, L. (2013)
104. Nkurunziza, A., Van Endert, N., Bagirisano, J., Hitayezu, J. B., Dewaele, S., Tengera, O., & Jans, G. (2020)
105. UNAID (2017) 106. National Institute of Statistics of Rwanda (2016) 107. National Institute of Statistics of Rwanda (2016)

Rwanda has achieved progress in improving overall literacy rates and improving girls' primary school education enrolment. **Rwanda ranks 115 out of 146 countries on the educational attainment global gender gap sub-index 2021.**[108] In 2021, female literacy stood at 69.4% compared to 77.6% among males, with female literacy rate still higher than the SSA average at 58.9%.[109] Despite clear progress including achievement of gender parity at primary school enrolment, girls (and boys) continue to face barriers in accessing secondary and higher education (explored further in section 3.3).

Gender-based violence continues to limit women's rights and wellbeing. According to the 2019/2020 demographic and health survey (DHS), over 46% of ever married women have experienced emotional, sexual or physical violence in the past 12 months.[110] In addition, child marriage continues to restrict many women's opportunities; according to the 2019/2020 DHS, 9% of women in Rwanda are married before their 18th birthday.[111]

3.3 Status of the economy, labour force participation and employment

Rwanda has emerged as an African power nation in the wake of the 1994 genocide against the Tutsi. Rwanda's post-1994 economic transformation has served as a model for smaller African economies, due to its strategic public investments and policy reforms, sustained economic growth and highly active female labour force.

Indicator		Value	Source
GDP in 2020, USD million		10,334	World Bank
GDP growth, %	2020	-3.36	World Bank
	2021F	5.10	IMF
	2025F	7.50	IMF
Debt-to-GDP ratio in 2020, %		61	Euromonitor Passport
Inflation, %	2010	-0.25	World Bank
	2015	2.53	World Bank
	2020	9.85	World Bank
	2021F	2.40	IMF
	2025F	5.00	IMF

Note: F=Forecast
Source: Euromonitor International, Passport; World Bank; IMF

Since 1994, it has outpaced the growth of other SSA conflict-affected countries due to successful economic rehabilitation and stabilisation reforms, public investments in health and education, a proactive approach to engaging women in economic activities, and a supportive environment for the ease of doing business, which encourages both foreign direct investment (FDI) and private sector participation. The Rwandan economy grew by 8% annually over the past decade, and GDP reached USD12.6 billion in 2019.[112] However, in 2020, the country's economy contracted by 3.4%, with GDP reducing to USD10.3 billion, partly due to the COVID-19 pandemic.[113]

108. World Economic Forum (2022). Global Gender Gap Report 2022 - Insight Report
109. World Economic Forum (2021). Global Gender Gap Report 2021 - Insight Report
110. National Institute of Statistics of Rwanda (2021a)
111. UNICEF (2018) 112. Euromonitor International (2020) 113. World Bank 2022

Between 2000 and 2019, Rwanda exceeded its targets across several strategic areas. This includes achieving near universal health coverage, successfully advancing its broadband infrastructure, digitising basic governmental services, and progressing on its cashless society ambitions.[114] To achieve this, Rwanda invested about 10% of its GDP[115] in labour, health and education, growth-enhancing public infrastructure, and green field enterprises in strong-potential sectors.[116]

The country has also made strategic use of international financing support, backed by accountability mechanisms.[117] For example, Rwanda's Donor Coordination Framework has monitored and assessed the government's compliance with donor commitments. In addition, Rwanda has long advocated a zero-tolerance policy for corruption,[118] which includes individual accountability contracts (*Imihigo* or "pledge") for public servants to serve their country ethically and against strict performance goals.[119] Rwanda's annual Leadership Retreat (*Umwiherero*),[120] timed with its mid-year budget review, serves as a platform to course-correct budget planning and inefficiencies, and to hold public officials accountable for their successes (or lack thereof).[121]

While much progress has been made over recent decades, Rwanda's economy still faces several structural challenges. These include food insecurity and reliance on food imports, energy shortages, instability in neighbouring countries and underdeveloped transport linkages to other countries.[122] These obstacles have served as constraints to the growth of the private sector, despite Rwanda's supportive regulatory environment for doing business.[123]

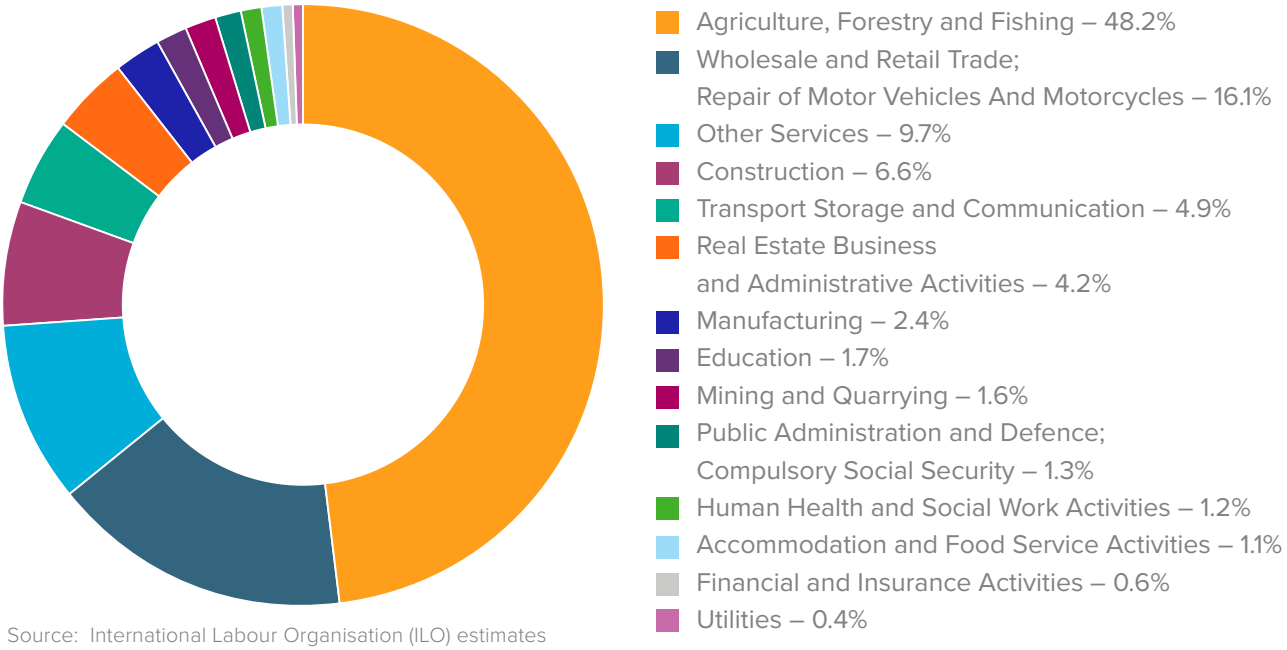
As part of its investments in economic development, Rwanda focused primarily on the agricultural sector, although the services and industry sectors are also growing. Agriculture forms the economic foundation of the country, accounting for 33-37% of its GDP in terms of gross value added (GVA) in 2019.[124] Agricultural exports alone accounted for 63% of the country's export earnings,[125] primarily in coffee and tea.[126] An estimated 62-78% of Rwandans work in agriculture in some form (although not necessarily full-time). In recent years, the sector benefited from expanded investments in crop diversification and quality assurance, which have increased productivity.

114. International Monetary Fund (2020a) 115. International Monetary Fund (2020a) 116. International Monetary Fund (2020a)
117. International Monetary Fund (2020a) 118. International Monetary Fund (2020a) 119. Rwandapedia (n.d.)
120. Republic of Rwanda (2020) 121. International Monetary Fund (2020a)
122. CIA World Factbook (2021b). Rwanda country profile 123. International Monetary Fund (2020a)
124. Euromonitor International Passport estimates (2019)
125. CIA World Factbook (2021b). Rwanda country profile
126. International Development Research Centre, Euromonitor International (2020)

Rwanda's economy has also diversified into the services and industrial sectors in recent years. In the services sector, real estate and wholesale/retail trade contributed 12.8% and 10.5%, respectively, of GDP GVA in 2019. In the industrial sector, construction and manufacturing together accounted for 11.5% of GDP GVA in 2019.[127] Income from tourism, centred on mountain gorilla trips, also grew by a significant 388.7% in the period from 2000 to 2014.[128]

In terms of employment across the 3 broad industry types, agriculture is the largest sector for full-time labour (share of 48.2%), followed by services at 41.2% and industrial activities at 10.6%. Within the latter two sectors, wholesale/retail trade, construction, and transport storage and communication ranked as the largest employing activities at 16.1%, 6.6%, and 4.9%, respectively, of the full-time labour force in 2019.[129]

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



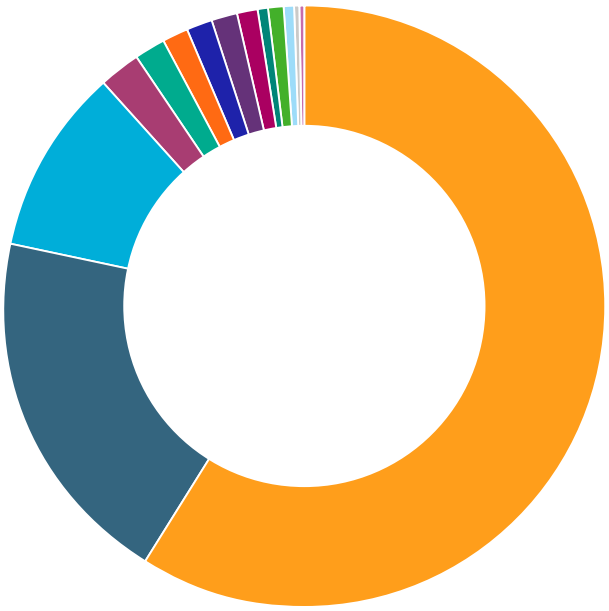
Source: International Labour Organisation (ILO) estimates

127. Euromonitor International Passport estimates (2019)
128. International Development Research Centre, Euromonitor International (2020)
129. Euromonitor International (2020)

Rwanda's unemployment rate was 1.4% in 2020, but this is not reflective of productive employment.[130] In reality, only 3.1 million Rwandans aged over 16 find work in (semi)-professional occupations, with another 1.7 million classified as "food producers"[131] mostly working in the informal sector. Meanwhile, 800,000 people's employment prospects are hindered by age or disability-related discrimination.[132] Economic activity and employment remain relatively concentrated in Kigali, with less job growth occurring in the rest of Rwanda. This geographic clustering of jobs contributes to economic inequality - currently, 63% of the population in urban areas is in the highest wealth quintile, as compared with 11% of the population in rural areas,[133] and the income of the richest 10% of Rwandans is 3.2 times that of the poorest 40%.[134]

Agriculture accounted for 59% of the female labour force in 2019, followed by 37.9% for services, and 3% for industrial sectors. In the latter two sectors, wholesale/retail trade, real estate and social services are the largest employing activities for women, at 19.6%, 2.3% and 1.6%, respectively, of total female employment in 2020.[135] According to the census from the National Institute of Statistics Rwanda, men in Rwanda dominate industrial and factory occupations.[136]

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



Source: International Labour Organisation (ILO) estimates

130. World Bank Open Data (2020). Rwanda 131. Bertelsmann Stiftung (2020) 132. Bertelsmann Stiftung (2020)
133. National Institute of Statistics of Rwanda (NISR) 2021a 134. Bertelsmann Stiftung (2020)
135. International Labour Organization estimates for 2020
136. International Development Research Centre (IDRC), Euromonitor International (2020)

Women's economic participation stands at a notable 83.9%.[137] In addition, women account for only 41.28% of employees in skilled professions (professional and technical workers).[138] A gender pay gap exists with women making 88 cents on the dollar compared with men. However, this gap is still considerably smaller in Rwanda than most developed countries including the United States of America (USA).[139] However, despite this progress, women-owned businesses represented only 26% of all businesses in Rwanda in 2019.[140] Unemployment, underemployment and youth unemployment remain considerably higher for women than men.[141] Women's Vulnerable Employment (WVE) in Rwanda stood at 77% in 2019.[142] As at 2020, most women (83.4%) work in the informal sector or in low-wage occupations where they earn on average 60% the earnings of men.[143] In addition, women are much less likely to hold higher-paying managerial positions - there were 6,000 female managers and 35,000 male managers in 2018.[144] Furthermore, a significant gender pay gap persists, for example in 2020, the average monthly income gap between females and males educated to university level is RWF68,560 (USD65.8), while it is RWF12,425 (USD11.9) for females versus males without education.[145]

Initially projected to grow by 8%, Rwanda's economic growth is now estimated to have contracted by 3.36% in 2020.[146] The COVID-19 pandemic severely dented the country's trade and supply chains following Chinese factory shutdowns, as China contributes to more than 20% of Rwandan imports.[147] Value chain disruptions on imports of inputs and capital goods pressured prices and undermined retail, transport, manufacturing and construction activities.[148] Meanwhile, declining global demand for Rwandan agricultural output also impacted the livelihood of rural segments and vulnerable communities.[149]

To manage the impact of the COVID-19 pandemic, Rwandan authorities rolled out health and economic measures totalling USD311 million[150] **(3.3% of GDP).** The stimulus package included cash payments to households in precarious financial conditions, purchase support for agricultural inputs and a special lifeline fund for businesses.[151] In March 2020, the Rwandan Central Bank introduced extended lending facilities, rediscounted existing treasury bonds, reduced reserve requirement ratios to free up liquidity in support of businesses and removed charges for online banking services. By October 2020, the International Monetary Fund (IMF) approved the disbursement of

137. World Bank Open Data (2019). Rwanda 138. World Economic Forum (2022). Global Gender Gap Report 2022 - Insight Report
139. International Development Research Centre (IDRC), Euromonitor International (2020) 140. Euromonitor International (2020). WEESSA Scoping report 141. International Development Research Centre (IDRC), Euromonitor International (2020)
142. Euromonitor International (2020). WEESSA Scoping report 143. World Economic Forum (2021). Global Gender Gap Report 2021 - Insight Report 144. International Development Research Centre (IDRC), Euromonitor International (2020)
145. National Institute of Statistics of Rwanda (NISR) 2021b 146. World Bank (2021b) Rwanda Economic Update
147. International Monetary Fund (2020b) 148. United Nations Rwanda (2020) 149. United Nations Rwanda (2020)
150. International Monetary Fund (2020c) 151. Coface (2022)

USD220.5 million under a Rapid Credit Facility in support of Rwanda's "urgent balance of payment needs" in the wake of the pandemic, to support the deterioration in the country's foreign reserves.[152]

The COVID-19 pandemic and subsequent lockdowns had disproportionate impacts for women in terms of unpaid work, care burden and lost income, particularly for those relying on informal businesses.[153] Since Rwandan women are overrepresented in daily wage jobs, female-headed households remain at greater risk of falling into deeper poverty levels.[154] With many social protection programmes operating at a much smaller scale and slower pace, women (who are more likely to be beneficiaries than men) are also burdened by shrinking social safety nets.[155]

3.4 Structure and functions of government

Rwanda is divided into five provinces (including the City of Kigali), 30 districts, 416 sectors (*"Umurenge"*), 2,148 cells and 14,837 villages.[156] Provincial governors are appointed by the central government, while districts are the most important governance level, with financial and legal independence, as enshrined in the 2006 National Decentralisation Policy. They are governed by an elected district council. Budget is allocated centrally from the Local Authority Budget Support Fund and supplemented by grants earmarked for specific purposes. The Rwanda Revenue Authority collects district revenues, such as property taxes, trade licence taxes and fees, centrally on behalf of districts.[157] Local governments have become the main implementer of national policies, with most recent available estimates indicating that they executed more than 25% of the domestic budget in 2011-2012 and employ 50% of the Rwandan administration.[158]

Customary laws and grassroot-level authorities are key influencing structures at the local level for various issues, including land rights. Article 201 (3) of Constitution, 2003 recognises unwritten customary laws, which cannot be replaced by written laws, but must not be inconsistent with the Constitution. Additionally, customary laws are mandated to not violate human rights, prejudice public order or offend decency and morals.[159] As per Rwandan tradition, men are the head of the household, and exercise control over family assets, including land and family property.[160] Accordingly, sons are entitled to inherit part of their father's land when they reach marital age.[161] In cases where there are no sons, or where sons are deceased, land to be inherited is given to grandsons.[162] Men may also receive land from family members, or occasionally from the family of his wife, either when he marries or when a son is born.[163]

152. International Monetary Fund (2020b) 153. UN Women (2021) 154. United Nations Rwanda (2020) 155. United Nations Rwanda (2020)
156. Republic of Rwanda. Accessed 12 July 2022. https://www.gov.rw/government/administrative-structure
157. Rwanda Revenue Authority and Kopanyi (2015) 158. Republic of Rwanda. Accessed 12 July 2022. https://www.gov.rw/cabinet
159. Parliament of Rwanda. Accessed 12 July 2022. https://www.parliament.gov.rw/women-representation
160. Independent candidates are also permitted to contest provided they fulfil all requirements. Mushimiyimana, D. (2018)
161. Chemouni, B. (2014) 162. UN Women (n.d.) 163. Food and Agriculture Organization (FAO) (n.d.)

Rwanda at a glance

Type of government	Presidential republic
Executive	**President and Government** 20 Ministers and 10 Ministers of State (55% female)[164]
Legislature	**Bicameral parliament** Senate - 36% female Chamber of Deputies - 61.3% female[165]
Judiciary	Supreme Court, High Court of the Judiciary
Political parties	10 political parties Ruling party: **Rwandan Patriotic Front (RPF)**, in power since 2000
Governance	Federal Republic **with two levels of government**: Federal, Local
Voting system	Party-list proportional representation[166]

164. Lankhorst, M., & Veldman, M. (2011)
165. Lankhorst, M., & Veldman, M. (2011)
166. Lankhorst, M., & Veldman, M. (2011)

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

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

4.1 Structural factors

4.1.1 Legal and policy commitments

The Rwandan Constitution guarantees equal gender rights for both women and men. The government has established gender equality as a legal framework.[167] According to Article 9 adopted in 2003, women are guaranteed equal gender rights, along with 30% representation in decision-making organs.[168]

2015 revision to the Constitution of the Republic of Rwanda 2003

Article 2: Provides for universal and equal suffrage for men and women;
Article 10(4°): Provides for equality of all Rwandans and equality between men and women as a fundamental principle of the State of Rwanda. The same provision also guarantees that women must occupy at least 30% of positions in decision-making positions;
Article 15: Guarantees equality of all persons before the law and equal protection of the law;
Article 16: Outlaws discrimination of any kind and the promotion of discrimination, including discrimination based on sex; and
Article 17: Protects the right to marry and found a family with full and free consent of each of the spouses, and for spouses to have equal rights and obligations at the time of marriage, during the marriage and in divorce.

At an international level, Rwanda has taken steps to ensure fairness and equality including recognising the various Conventions based on the Declaration of Human Rights. These include the Convention on Elimination of All Forms of Discrimination Against Women (ratified in 1981), the Convention on the Rights of the Child (ratified in 1991), and the Convention on the Rights of Persons with Disabilities (ratified in 2010).[169]

The National Strategy for Transformation (NST1) (2017-2024) includes gender as a key cross-cutting theme to achieve sustained growth and transformation guided by Vision 2050 and 2035 targets. This includes a commitment to mainstreaming gender across sectors, district strategies and investments. Focus areas include facilitating women's access to finance, mainstreaming gender in employment and job creation strategies, strengthening gender capacity, tools and data, as well as strengthening GBV prevention and response efforts. The former Economic Development and Poverty Reduction Strategy (2013-2018) identified agriculture,

167. Lindberg, K. (2017)
168. Constitute (2022)
169. OHCHR (n.d.)

infrastructure, private sector, ICT and environment and natural resources as key sectors for women's (and men's) economic empowerment.[170] The Rwandan government has also heavily committed to training, financing, and coaching programmes for female entrepreneurship. For example, umbrella organisations like the Rwanda Chamber of Women Entrepreneurs and supporting organisations like Centre D'Appui aux Petites et Moyennes Entreprises au Rwanda have played a vital role in the success of handicraft and mushroom businesses, respectively, among Rwandan women. [171]

NST1 Gender and Family Promotion Commitments[172]

- Continuing to facilitate women to access finance;
- Mainstreaming gender in employment and job creation strategies; strengthening capacities of gender machinery and use of gender mainstreaming tools and disaggregated data to inform policy formulation and resource allocation;
- Scaling up ECDs services at village level;
- Continuing awareness and fight against gender-based violence and human trafficking;
- Enhancing coordination among stakeholders to reintegrate street children and prevent delinquency.

Gender-informed policy making is complemented by gender-responsive budgeting. Beginning in 2012-2013, the country enacted a budget law that incorporated gender budgeting formally, making gender budgeting mandatory across all Budget Statements.[173] The gender budgeting was piloted across four ministries - Education, Health, Agriculture and Infrastructure. It was subsequently rolled out to the entire national government, and further extended to the sub-national level (districts).[174] The lead role in coordinating all gender budgeting efforts is played by the Ministry of Finance and Economic Planning (MINECOFIN) in collaboration with the Ministry of Gender and Family Promotion (MIGEPROF).[175] Significant steps have been taken to integrate gender budgeting within public financial management. Gender goals and fiscal priorities have been identified across public service initiatives.[176] As a result, gender-responsive budgeting has been linked to improved gender-related outcomes in numerous areas including girls' education, maternal mortality and labour force participation.[177]

170. Republic of Rwanda (2013) 171. International Development Research Centre (IDRC), Euromonitor International (2020)
172. Republic of Rwanda (n.d.) National_Strategy_For_Transformation
173. Stotsky, J. (2017) 174. Stotsky, J. (2017) 175. Stotsky, J. (2017) 176. Stotsky, J. (2017)
177. Stotsky, J., Kolovich, L., & Kebha, S. (2016)

Gender has been mainstreamed in environment and climate change policy making. The green growth and climate resilience strategy (GGCRS), for example, states the need to conduct a robust gender analysis assessment for informing gender-responsive approaches in its implementation.[178] The Environmental and Climate Change (2019) policy urges for effective involvement of women and youth in environment and climate change management, intervention, and decision making as essential.[179]

4.1.2 Policy and civil society environment

Rwanda has articulated clear policies and strategies to mainstream gender across policy programming efforts. In line with the NST1 mandate and Sustainable Development Goals, in February 2021, a Revised National Gender Policy (2021) was put in place.[180] The priority areas include: engendering national planning frameworks and policies; accelerating women's economic empowerment; promoting gender equality and equity in education, health and social protection; supporting best practices for gender promotion; engaging men and boys; increasing women's participation and leadership in decision-making positions; enhancing gender capacity development; and integrating gender equality within legal frameworks.[181]

Notably, in 2019, the Ministry of Agriculture and Animal Resources launched the second Gender and Youth Mainstreaming Strategy in agriculture, with a focus on five key areas including: (i) equal access to financial services; (ii) equal representation in market and value chains; (iii) equal access to extension support, inputs and technologies; (iv) empowerment and decision making; and (v) institutional gender mainstreaming.[182] This strategy was to be implemented in line with the 4th Strategic Plan for Agriculture Transformation (PSTA 4).

The main formal institutions in charge of gender promotion focus on ensuring strategic coordination of policy implementation in gender, family, women's empowerment and children's issues. This includes the Ministry of Gender and Family Promotion (MIGEPROF), the Gender Monitoring Office (GMO), the National Women's Council (NWC) and the Forum des Femmes Rwandaises Parlementaires (FFRP). To maximise efforts across policy programming, MIGEPROF is responsible for overseeing and coordinating policy implementation across gender and family promotion, women's empowerment, and children's rights protection.[183] The Ministry of Gender and Family Promotion also manages the National Women's Council, which is a national forum to share ideas and solutions for gender-based problems.

178. Hakuzimana, H (2020) 179. Hakuzimana, H (2020)
180. MIGEPROF, Rwanda (2021) 181. MIGEPROF, Rwanda (2021)
182. Ministry of Agriculture and Animal Resources MINAGRI (2019) 183. MIGEPROF, Rwanda (n.d.)

The work of these government institutions is complemented by several civil society organisation (CSO) initiatives,[184] as civil society organisations work in tandem with the government to implement interventions. For instance, in 2019, Pro-Femmes Twese Hamwe, African Evangelistic Enterprise (AEE) and Young Women Christian Association (YWCA) notably secured contracts from the government to monitor the implementation of social protection programmes. This was a significant milestone in CSO-government relations, reinforcing the importance of civil society as a partner for community outreach and social protection.[185] Some key CSOs are listed in the table on the following page:

The Rwandan government has passed domestic legislation to implement international obligations, promote gender equality and address gender-based discrimination.[186] Sexual harassment in the workplace is criminalised, indicated in Article 203 of the Rwandan penal code, which includes provisions for prison sentences and fines.[187] Law No. 13/2009 of 27 May 2009, which mandates for rights such as contracts, wages, safety and trade unions, as well as rights specific to support women, including non-discrimination, considerations to protect pregnant and lactating women, and maternity leave (up to 84 days).[188] Women also have the right to enjoy special protection during pregnancy and paid maternity leave, and the right not to be dismissed on grounds of pregnancy or maternity leave.[189] Other relevant legal instruments are Article 168 of the Rwandan Constitution, international and regional instruments ratified by Rwanda on labour rights and working conditions for women workers.[190] Similarly, equal marriage and divorce rights are enshrined in law, and domestic violence is criminalised.[191] More recently, Law No. 66/2018 of 30 August 2018 regulating Labour in Rwanda provides for equal rights to employment for both women and men, girls and boys, and guarantees equal remuneration for equal work for both females and males.[192] However, there is also no prohibition on gender discrimination in access to credit. Furthermore, marital laws and legal frameworks also limit women's capacity to exercise agency and make autonomous decisions. According to Article 206, in married unions, the husband remains the head of the household, and under Article 83, women remain obligated to live in their husband's home.[193]

Rwanda continues to reform its laws to ensure greater gender equity. For example, the Law on Persons and Family has recently undergone changes to ensure greater gender equality. Article 215(3) of the law originally provided that a widowed woman could not remarry before the expiration of 300 days following her husband's death.[194]

184. The Legal Aid Forum (2021) 185. USAID, Bureau for Democracy, Conflict and Humanitarian Assistance, & Center of Excellence on Democracy, Human Rights and Governance. (2020) 186. The Legal Aid Forum (2021) 187. Organic Law No. 01/2012/OL of 2 May 2012 instituting the penal code, Official Gazette nº Special of 14 June 2012 in Tite (2018) 188. Tite, N. (2018)
189. UN Women (n.d.) https://evaw-global-database.unwomen.org/en/countries/africa/rwanda 190. Tite, N. (2018)
191. World Bank (n.d.) Women, Business and the Law database: https://wbl.worldbank.org/en/data/exploreeconomies/rwanda/2021
192. Gender Monitoring Office (GMO) Rwanda (2019) 193. Allan, D. (2012) 194. The Legal Aid Forum (2021)

Organisation	Key Focus Areas	Research	Advocacy	Programming
CARE Rwanda	International humanitarian organisation fighting global poverty with a focus on women and girls. Utilises community-based efforts to improve education, health and economic opportunity. Pursues gender justice in Rwanda, using tested intervention models for transformation and impact while partnering with local organisations for sustainable impact.	✓	✓	✓
Rwanda Men's Resource Center (RWAMREC)	Initially conceived as a male-only organisation working with men to promote gender equality by encouraging positive masculinities and utilising male engagement approaches in development programmes. Key focus is on working with men/women and boys/girls (cross-gender dialogue) to address sexual and gender-based violence, enhance men's understanding and support for women's empowerment initiatives, and promoting the adoption of healthy and non-violent behaviours among men.	✓	✓	✓
Pro-Femmes Twese Hamwe	Large NGO network comprising 54 member associations, working on a broad range of topics, from economic and political empowerment or maternal and reproductive health to preventing gender-based violence. Several of these members, such as YWCA, Rwanda Women's Network, Haguruka, or the Faith Victory Association (FVA) have successfully collaborated with local governments on implementing interventions on women's empowerment.	✓	✓	✓
Rwanda Chamber of Women Entrepreneurs (RCWE)	Umbrella organisation representing female entrepreneurs and SMEs in Rwanda. Focuses on capacity building, advocacy, networking, support services, social corporate responsibility and forging partnerships with key stakeholders.		✓	✓
Nyamirambo Women's Center	NGO in Kigali providing vocational training and education to low-income women.		✓	✓
Women for Women Rwanda (sister organisation to Women for Women International)	After becoming independent, the organisation continues to help women know and defend their rights, influence decisions at home and in their communities, be more active in the economy.	✓	✓	✓
Rwanda Women's Network (RWN)	NGO (established in 1997) dedicated to promoting and strengthening strategies that empower women. Has a localised presence in 17 districts with over 60 staff members across Rwanda.	✓	✓	✓
Haguruka	NGO (established in 1991) that promotes and defends the rights of women and children. Works towards combating gender-based violence (GBV) and promoting gender equality.	✓	✓	✓

The purpose of the waiting period was to avoid disputes over the paternity of a child that might arise from a recently dissolved marriage, yet a DNA test could resolve this without compromising the equal right of women to remarry. Article 16 of the 2020 amendment law states that "a widowed spouse has the right to remarry".[195] In addition, Article 243 of the 2020 amendment law has established that the best interests of the child are the only benchmark in determining parental custody of the child, with no legal preference based on the gender of the parent. Prior to this, unless the child's best interest was at risk, mothers had clear preference in the decision of custody for children aged below six years. Still, this amendment allows for legal-based gender equality for both mothers and fathers.[196]

Legal provisions do not regulate the informal sector, with some exceptions. As per the labour law (Article 1), only health and safety, social security and trade unions apply to the informal sector. For work carried out as part of family activities (Article 3) only prohibitions of child labour and of specific work for pregnant women apply.[197] Furthermore, although a minimum guaranteed wage (MGW) is mentioned in Article 76, this has not been implemented. The article states that the MGW per category of work is to be determined by an Order of the Minister in charge of labour after collective consultations. This order has never been enacted. Wages in the horticulture sector are determined by the price paid to their casual employer in the same region, and the minimum salary varies between RWF800 and RWF1,500 (USD0.77 and USD1.44) per day.[198]

Rwanda is one of the first countries in Sub-Saharan Africa to enact a law that provides equal inheritance rights for both men and women, through Law No. 22/99 of 12 November 1999.[199] The 2004 National Land Policy and Organic Land Law No. 08/2005, further strengthened women's land rights by prohibiting against all forms of discrimination in access and ownership of land. The Land Tenure Regularisation Programme (LTRP) began in 2009, including an ambitious goal to transform women's land rights. An evaluation of the LTRP found that the intervention has facilitated joint titling of land and increased (married) women's ownership over land. However, unmarried women saw diminished property rights, due to gaps in the legal framework which does not recognise property rights of women in unofficial or polygamous partnerships with men.[200] Although policies have been developed to improve land tenure security for women, research suggests that women are still discriminated against in decision-making processes at village level.[201]

195. The Legal Aid Forum (2021) 196. The Legal Aid Forum (2021) 197. Tite, N. (2018) 198. Tite, N. (2018)
199. Rwanda Initiative for Sustainable Development (RISD), Global Initiative for Economic, Social and Cultural Rights (GI-ESCR), & ActionAid Rwanda (AAR). (2017) 200. Ali, D. A., Deininger, K., & Goldstein, M. (2011) 201. Jones-Casey, Dick, & Bizoza (2014) in Gerard (2020)

As a part of its macroeconomic policies to enable women's financial inclusion, the government's Vision 2020 Umurenge Programme, provided work opportunities and loans for rural beneficiaries with the aim of reaching a 50% women beneficiary quota.[202] The goal was to triple the number of girls enrolled in technical and vocational training (TVET) by the year 2020.[203] An independent evaluation of the programme however found limited impact on women's economic empowerment, with payments frequently delayed, work opportunities located far away from dwellings, and no support for reducing the household chores burden thereby significantly impeding women's economic participation.[204]

While promising in terms of clear legal frameworks, challenges with labour law implementation remain. Mixed-method research (2018) in the horticulture sector found that laws have not been effective in protecting women workers in the sector, and working conditions remain poor. Inspectors at district levels can receive labour disputes, but neither typically nor often visit sites to check compliance with labour rights. No punishment exists for those who violate the labour laws, and no firms have ever been closed as a response to violations.[205]

4.2 Normative factors

4.2.1 Norms around paid and unpaid labour

Rwandan society is still governed by patriarchal gender norms which assign unpaid care and domestic work to women. Women's "double workday" limits their paid work opportunities.[206] This includes childcare, household chores, provision of water and fuel, and food preparation, thus limiting the time they can dedicate to paid work. Rwandan women's productive capacity is also heavily hindered by their unpaid care work in the household - 23.5 hours/week compared with men's 13.5 hours/week.[207] Women spend more time than men on household shopping and cooking (12.5 hours/week), collecting water (4.3 hours) and firewood (4.7 hours), but considerably less time than their female counterparts in neighbouring East African countries.[208]

Gender norms also affect the division of labour among smallholder families. For example, while women do most of the work of planting, weeding and harvesting, men tend to deal with marketing of produce and cash transactions.[209] Women's paid work activities are restricted by their household duties and childcare, while men's role as head of household sets the expectation that they will be the main breadwinner. It is more

202. Global Leaders' Meeting on Gender Equality and Women's Empowerment, 2015
203. Global Leaders' Meeting on Gender Equality and Women's Empowerment, 2015
204. Food and Agriculture Organization (FAO) and UNICEF (2016)
205. Tite, N. (2018)
206. Blackden, M., Munganyinka, T., Mirembe, J., & Mugabe, A. S. (2011)
207. International Development Research Centre (IDRC), Euromonitor International (2020)
208. International Development Research Centre (IDRC), Euromonitor International (2020)
209. Rohwerder, B., Müller, C., Nyamulinda, B., Chopra, D., Zambelli, E., & Hossain, N. (2017)

socially accepted for women in female-headed households to engage in paid work, which is also borne out of necessity to meet family needs.[210]

Gender-inequitable attitudes around women and men's respective roles in the household are highly prevalent. According to a 2010 multi-country study on men's attitudes in seven countries (Brazil, Chile, Croatia, India, Mexico, Rwanda and South Africa), Rwandan men had among the most inequitable attitudes towards women's role in the household as well as a high acceptability of men's use of violence against women.[211]

The Rwandan government and partners have invested in innovative approaches engaging men and boys to address inequitable household division of labour. For example, the Rwanda Men's Resource Centre (RWAMREC) delivers male-centred approaches to promote gender equality. The aim of these approaches is to promote gender-equitable attitudes and norms to reduce women's unpaid care burden, freeing up their time to engage in economic opportunities.[212]

4.2.2 Voice, representation and leadership in decision-making

The Rwandan quota system, which requires that women are granted 30% of posts in decision-making organs (Constitution, Article 9 [4]), led to a record-breaking high share of women in politics. [213] At the sub-national level, the electoral law states that: "*... at least thirty per cent (30%) of all District Council members shall be women and shall be elected through indirect and secret ballot as well as by the members of the Council Bureau of Sectors.*" (Article 156). Women currently make up 61% of the 80 seats in the lower house (Chamber of Deputies) and 36% of seats in the Senate. Political parties are mandated to include 30% women on all their candidate lists. Members of the Senate are indirectly elected or appointed, subject to the 30% provision.[214]

Gender-based cultural and economic barriers remain, despite high levels of women's political representation. Inequitable household norms still constrain women's ability to engage in economic activities, control their own earnings, or contribute towards making decisions. Men's roles as economic providers and decision-making authorities in the household, constrain WEE outcomes and contribute to and underpin high rates of intimate partner

210. Rohwerder, B., Müller, C., Nyamulinda, B., Chopra, D., Zambelli, E., & Hossain, N. (2017)
211. Barker, G., Contreras, J. M., Heilman, B., Singh, A., Verma, R., & Nascimento, M. (2011)
212. Gender Monitoring Office (GMO) Rwanda (2019)
213. International Institute for Democracy and Electoral Assistance (International IDEA). (2022, April 17). Gender Quotas Database
214. International Institute for Democracy and Electoral Assistance (International IDEA). (2022, April 17). Gender Quotas Database

violence (including economic violence).[215] Furthermore, the ultimate decision on whether and how much married women can engage in paid work still lies with the husband, with disagreements around this issue being a common cause of marital conflict and violence. [216]

Inequitable household dynamics hinder the extent to which women can benefit from membership in cooperatives and associations. An assessment of Village Savings and Loans Associations (VSLAs) supported by CARE found that husbands restricted women's roles in VSLAs, and controlled decisions about loans and purchases. In some instances, women also suffered backlash from husbands for challenging gender norms by engaging in income-earning activities outside of the home. As a result, CARE developed an approach targeting husbands of VSLA members to foster greater support and promote gender-equitable attitudes and behaviours. As a result, men became more involved in household work, and there was a reduction in household poverty and reduced conflict between partners.[217]

4.2.3 Women's freedom of mobility

Restrictions around women's mobility impede their access to markets. This is especially an issue for younger women in terms of safety concerns travelling alone or at night.[218] The country has witnessed an increase in local civil society organisations that promote women's economic activities.[219] While promising, this phenomenon remains hyper-localised and limited to women's immediate household and community environments.

Restrictions on women's mobility contribute to their overrepresentation in the informal sector. Women's access to markets is hindered due to their involvement in home-based trade, and customary gender norms which limit them from riding motorcycles or bikes.[220] Care-based and domestic responsibilities also limit their access to service delivery and government initiatives outside of the household.[221] Certain normative barriers around women being viewed as inappropriate or "promiscuous" also govern their ability to leave the house for both productive labour as well as potentially expanding their social capital.[222]

4.2.3 Violence against women and girls

Violence against women and girls (VAWG) constrains women's outcomes and is intrinsically linked to women's employment and earning potential, along with access to resources. Approximately one in five women have experienced intimate partner violence in the last 12 months.[223]

215. Stern, E., Heise, L., & McLean, L. (2018) 216. Stern, E., Heise, L., & McLean, L. (2018)
217. The Prevention Collaborative (2019) 218. USAID (2015a) 219. Rietveld, A. (2017) 220. USAID (2015a)
221. USAID (2015a) 222. Rietveld, A. (2017)
223. UN Women (n.d.). Global Database on Violence against Women

As well as physical and sexual violence, women experience economic violence including land and asset dispossession.[224] Many women have experienced increased violence from male family members in response to their rightful claim to land through the implementation of the Land Tenure Regularisation Programme (LTRP).[225] **Women experience violence and sexual harassment in the workplace.** Informal work environments leave women vulnerable and without access to social benefits. In urban areas, women traders remain unsafe, and SME owners engaged in cross-border trade with the Democratic Republic of Congo face sexual harassment and lack support facilities such as day care centres, which support their work.[226] The Tushiriki Wote ("Let's all participate") project delivered by International Alert and Réseau des Femmes with support from the Ministry of Trade, Industry and East African Affairs and MIGEPROF aims to strengthen women trader's economic empowerment and is trying to address the challenge of sexual harassment through skills building and creating an enabling environment through engagement with local government and local bodies.[227]

Societal norms around men's traditional role as "providers" influence high rates of violence. A national level household survey conducted by the Rwanda Men's Resource Centre (RWAMREC) revealed that increase in women's income may also increase their exposure to violence. One of the possible explanations articulated includes limited acceptance towards evolving gender roles in a male-dominated society resistant to change.[228] As a result, WEE initiatives are increasingly including components to engage with male partners to mitigate against backlash and reduce intra-household conflict. For example, the Indashyikirwa (Agents of Change) programme, designed and implemented by CARE Rwanda, Rwanda Men's Resource Center (RWAMREC) and the Rwanda Women's Network (RWN), combines intensive participatory training with VSLA members and their husbands (couples training), community activism against intimate partner violence (IPV), training of opinion leaders, and direct support to survivors of intimate partner violence.[229] A randomised controlled trial (RCT) of the initiative found improvements in relationship quality, better communication and trust, improved conflict management, more gender-equitable attitudes and a 55% reduction in women's experience of physical and/or sexual intimate partner violence.[230]

224. RWAMREC, 2010 in Allan, D. (2012)
225. Rwanda Initiative for Sustainable Development (RISD), Global Initiative for Economic, Social and Cultural Rights (GI-ESCR), & ActionAid Rwanda (AAR). (2017) 226. The New Times (2017) 227. The New Times (2017) 228. Allan, D. (2012)
229. The Prevention Collaborative (2019) 230. Dunkle, K., Stern, E., Heise, L., McLean, L., & Chatterji, S. (2019)

4.3 Individual factors

4.3.1 Human capital

Rwanda has made significant progress in enabling girls' access to education since the early 2000s and has achieved gender parity in primary and secondary enrolment. As of 2020, the enrolment rate in primary and secondary school was 95.1% and 38.8% for girls, and 94.4% and 32.9% for boys, respectively.[231] Women were also integrated into the education workforce, where female staff (52.8%) members outnumbered male staff members (47.2%).[232] While girls are now less likely to repeat school years than boys, older girls are more likely to drop out of school than boys, due to factors including pregnancy, early marriage and poverty.[233]

Women and girls' performance and retention in higher education levels remains a challenge. Only 5.68% of young women enrol in tertiary education (compared to 6.8% of young men).[234] Furthermore, women's and girls' engagement in science and technology sectors remains low. At the university level, only 34% of undergraduates are women.[235] Women are also underrepresented in leadership and decision-making roles within school administrations. Expectations associated with women's educational achievements are reinforced by patriarchal social norms, where women are primarily responsible for domestic work and caregiving.[236]

Limited technical or business training opportunities mean many women remain concentrated in informal SMEs or lower levels of value chains. Specific examples include limited knowledge on modern farming techniques or limited entrepreneurship skills (e.g. accounting or marketing). Women may also not have the technical or business skills to scale or expand their production or processing, thereby limiting their earning potential. Generally, a lack of formal education and specialised training for farmers and agriculture sector workers remains a concern especially for women. Specifically, over 25% of farmers and agricultural workers have no formal education, with women comprising over 60% of that group.[237]

Information and communication technology (ICT) efforts targeting women remain low and unexplored. Smartphone and digital literacy levels are low, and women are less likely to have access to a mobile phone than men. Digital use cases have also not been designed for women as men continue to act as gatekeepers towards enabling access, use and uptake of technology-based interventions.[238]

However, women's participation in targeted policy programming efforts to build financial literacy can increase their involvement in income, credit, investment and expenditure decisions. These can be women's Village Savings and Loans Associations (VSLAs), explored in subsequent sections.

231. USAID (2014) 232. USAID (2014) 233. Laterite, (2019) 234. World Economic Forum (2022) Global Gender Gap Report 2022 - Insight Report
235. University Rwanda Statistics Office (2021) in Reilly, E. C. (2021). 236. Mugabe (2013) in USAID (2014)
237. National Institute of Statistics of Rwanda (NISR) (2018c) 238. GSMA (2019)

4.3.2 Social capital

Informal savings groups (*Ibimina* in Kinyarwanda - also known as Village Savings and Loans Associations VSLAs) are groups formed when individuals organise themselves to collectively save a defined portion of their income on a regular basis (daily, weekly, or monthly). The money is often gathered during regular meetings or deposited (individually) in the group's bank account.[239] At every meeting, the money gathered is loaned to one or more group members for their private use - on a rotational basis and in accordance with everyone's contribution. Some groups also collect additional funds from members for the group to fund common activities or equipment for general use (e.g. chairs, tables, notebooks, etc.).

About 77% of VSLA members are women,[240] who leveraging their collective resources (including network and finances), pool money for small income-generating projects (e.g. investments into crop or livestock farming) or social needs (e.g. school fees), while increasing their social capital.[241]

However, women's membership in VSLAs can remain constrained by patriarchal norms. A 2012 assessment of VSLAs in Rwanda found that men continue to dominate decisions around savings, and a significant proportion of women did not feel confident making decisions about a loan without their husband's approval.[242] However, a subsequent intervention by CARE International and partners which actively engaged men through gender-transformative group sessions found a positive impact on partners' collaboration in household responsibilities and care work, partner and family relations, and financial and household decision making.[243]

4.3.3 Economic capital

Financial assets

Limited access to capital or credit constrains women's ability to invest in, start, or expand their businesses. From purchasing bigger plots of land for coffee or tea, to buying expensive inputs for green beans, to purchasing manufactured leather to make and sell leather goods, many women need additional access to capital to succeed in their ventures. However, government initiatives have improved women's access to credit. For example, the government's Business Development Fund (BDF), which covers 75% of collateral requirements for women or youth who take a loan from a SACCO (50% for men). As of 2017, 42.3% of guarantee-funded SME projects belonged to women and 42.4% of loans were taken by women.[244]

239. The New Times (2013) 240. Women Connect (n.d.) 241. Women Connect (n.d.)
242. CARE, & Canada International Development Agency (CIDA). (2012)
243. Slegh, H., Barker, G., Kimonyo, A., Ndolimana, P., & Bannerman, M. (2013)
244. Gender Monitoring Office (GMO) Rwanda (2019)

Social protection efforts include the Vision 2020 Umurenge Programme (VUP), a large-scale social protection public works programme initiated by the Rwandan government in 2008. By 2015, the programme covered 130,000 households across the country.[245] With its mandate to target households as opposed to "heads of households", it was able to reach a large female beneficiary population, enabling them to access waged labour and earn cash through participation in public works.[246] However, while the majority of the employees participating were women, it did not always translate into retaining full or partial income through their bank accounts, due to constraining norms including inequitable household decision making and men's ownership of cash income.[247]

Productive assets

Women's low access to land, assets and/or collateral remains a key challenge. While married women have benefited from strengthened access to and ownership of land through legislation and the Land Tenure Regularisation Programme (LTRP), unmarried women in unofficial and polygamous partnerships continue to face significant discrimination in access to land. Female-headed households on average have plot sizes 10.5% smaller than their male counterparts, which restricts their agricultural outputs.[248] The Matrimonial Regimes, Liberties and Succession Law of 2000, which first recognised the right of women and girls to inherit and own land and property, did not extend to those married under customary law or those in polygamous or religious unions, which are common in rural areas.[249] This in turn sees women lacking access to the collateral they need to take out loans and invest in their businesses. However, legal reform entailing mandatory joint titling increased married women's land ownership in Rwanda.[250]

Domestic assets

Given women's domestic responsibilities, they spend substantially more time than men acquiring fuels for cooking. In rural areas the time burden is greater for women, as they are likely to spend twice as long as men on collecting and preparing firewood for fuel.[251] Only 13.5% of all households have energy-saving stoves/efficient cook stoves.[252] Overall, women remain the sole decision makers in 49.7% of cook stove purchases, which includes nearly 85% clean fuel stove purchases. However, overall access to electricity in female-headed households remains low at only 21.1%. One of the key barriers to acquiring the required infrastructure, including a grid connection, is high costs.[253]

245. Pavanello, S., Pozarny, P., De la O Campos, A. P., & Warring, N. (2016) 246. Pavanello, S., Pozarny, P., De la O Campos, A. P., & Warring, N. (2016) 247. Pavanello, S., Pozarny, P., De la O Campos, A. P., & Warring, N. (2016) 248. Ministry of Agriculture and Animal Resources MINAGRI (2018) 249. United Nations OHCHR & UN Women (2020) 250. Klugman, J., Hanmer, L., Twigg, S., Hasan, T., McCleary-Sills, J., & Santamaria, J. (2014) 251. Kooijman, A., & Gihana, D. (2020) 252. Kooijman, A., & Gihana, D. (2020) 253. Kooijman, A., & Gihana, D. (2020)

5. Sector analysis briefs

The following briefs provide an overview of two broad sectors in Rwanda: (i) Agriculture covering three sub-sectors - Coffee/Tea, Green (French) Beans and Fishing/Aquaculture - the latter via a short piece/ spotlight approach); and (ii) Leather and Leather Products.

Each sub-sector brief includes an overview of the gendered composition of jobs and the value chain, the presence and impact of cooperatives/ collectives as well as an analysis of barriers and enablers to women's economic empowerment within the sub-sector. Finally, the briefs highlight key opportunities and entry points, and sector-specific recommendations for both public and private stakeholders to improve women's economic status within these sub-sectors.

Agriculture Sector Stakeholders (Coffee/Tea, Green (French) Beans, Fishing/Aquaculture)

Stakeholder type	Province					
	Northern	**Southern**	**Eastern**	**Western**	**Kigali**	**National***
Associations, collectives, organisations, representative bodies	16	20	16	33	11	3
Government agencies/departments	-	-	-	-	-	3
Private companies	-	7	-	1	14	41
NGOs	-	-	-	-	2	3
TOTAL	**16**	**27**	**16**	**34**	**27**	**50**

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

From the stakeholder mapping exercise for agriculture, 170 stakeholders were identified across the various provinces of Rwanda. A summary table of stakeholder types across the provinces is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed here on the Pathways study website.

5.1 Agriculture

5.1.1 Coffee and tea

Sub-sector overview

Coffee and tea are major cash crops in Rwanda, constituting nearly 80% of all agricultural exports.[254] They are also a significant source of livelihoods for Rwandans, with just over one in 10 households (11%) cultivating them (10.8% grow coffee, 0.9% grow tea).[255]

Coffee

Coffee is the second biggest export for the country's economy (USD66 million worth of coffee sales in 2020),[256] although official figures are not published.[257] Coffee accounts for a third (35%) of export revenue, and annual production growth (from 18,500 tonnes in 2016 to an expected 32,500 tonnes by 2024) is an objective of Rwanda's Strategic Plan for Agriculture Transformation (PSTA 4).[258] Coffee has successfully rebounded since the crash in global coffee prices in the late 1980s, and the 1994 genocide against the Tutsi that destroyed much of the coffee infrastructure. Rwanda is increasingly recognised as an award-winning premium origin for coffee among speciality buyers and was the 38th largest exporter of coffee in the world in 2020.[259,260] Rwandan coffee has also started trading on the Alibaba e-commerce platform

254. National Institute of Agricultural Extension Management (n.d.) 255. UNCTAD (2014)
256. OEC 2020 (The Observatory of Economic Complexity). Accessed in April 2022 257. AgriLogic (2018) 258. NAEB (2021)
259. OEC 2020 (The Observatory of Economic Complexity). Accessed in April 2022 260. Gathani, S., & Stoelinga, D. (2013)

(Tmall Global, Alibaba's cross-border B2C platform), following a partnership between Alibaba and the government. Since the partnership began in 2018, sales volumes on the platform have grown by 700%.[261]

Coffee is coordinated under the National Agricultural Export Development Board (NAEB) (a merger of tea, coffee and horticulture authorities), under the Ministry of Agriculture.[262] The Rwanda Coffee Development Authority (OCIR CAFÉ), under the Rwandan Ministry of Agriculture and Animal Resources (MINAGRI), supervises activities from production to commercialisation.[263] Other key stakeholders include smallholder farmers, cooperatives, coffee washing stations, dry mills, traders, roasters, and exporters.[264]

Primary cooperatives in Rwanda can form cooperative unions. Cooperative unions can form federations, and federations can form confederations or apex cooperative organisations.[265] The Rwanda Coffee Cooperatives Federation is a member of the National Cooperative Confederation of Rwanda (NCCR).[266]

Around 400,000 smallholder farming households are involved in coffee production and depend on coffee for their livelihoods (2009 census), while jobs are created in washing stations, dry mills, processing and export facilities.[267] Over 300 coffee washing stations exist today (up from only two in 2002), two thirds of these are private, while others are managed by cooperatives. There are also nine dry mills and 19 roasters, while approximately 30 traders and over 80 exporters work in the sector. The medium to larger players dominate the market and take charge of most exported coffee, reducing suppliers' bargaining power and increasing competition for raw material (coffee cherries).[268] Some exporters invest significant resources in cupping labs[269] and experts, and apply for certification programmes.[270] A licence is required to export coffee, which can be obtained from the NAEB.[271]

Most Rwandan coffee is exported, with only 2% of production roasted and consumed locally.[272] The majority (98%) of production is of Arabica coffee, while only 2% of production is of Robusta coffee.[273]

261. RDB (n.d.). Accessed in April 2022 https://rdb.rw/export/export/products-directory/coffee-sector/
262. NAEB (n.d.)a https://naeb.gov.rw/index.php?id=48
263. Oxfam Novib (2016) 264. AgriLogic (2018) 265. Mukarugwiza (2010)
266. National Cooperative Confederation of Rwanda (NCCR) website. Accessed in April 2022 https://nccr.coop.rw/spip.php?rubrique4
267. Gathani, S., & Stoelinga, D. (2013) 268. AgriLogic (2018)
269. A method of assessing the flavour, quality and prospects of specific coffees and analysing what each has to offer
270. Gathani, S., & Stoelinga, D. (2013) 271. Women Connect (n.d.). Accessed in April 2022 https://www.womenconnect.org/web/rwanda/export-info/licences/-/asset_publisher/3Lw6ylNm4Ea0/content/export-license
272. AgriLogic (2018) 273. Gathani, S., & Stoelinga, D. (2013)

Coffee produced is both semi-washed and fully washed, with slightly different value chains depending on which method is utilised. For fully washed coffee, exporters either deal directly with smallholders (and buy unprocessed coffee to wash in wet mills themselves) or they buy from third-party wet mills. The washed coffee is then dry milled and exported as green coffee. Some exports also work as service providers for cooperatives and privately-owned wet mills, where they support with dry milling, marketing, financing and/or price risk management services to cooperatives and privately-owned wet mills.[274] For semi-washed coffee, exporters buy home-processed coffee from local dealers and traders, which is then also dry milled and exported as green coffee.[275]

Coffee washing stations (CWSs) process coffee (fully washed: de-pulped, washed and dried) from surrounding communities, and provide an opportunity for small-scale producers to engage directly with the supply chain and access support initiatives (such as training).[276] In 2016, the government introduced a "zoning" policy to improve traceability of coffee from farm to market, eliminate middlemen and increase farmers' incomes. This policy requiring coffee to be taken to nearby washing facilities, to improve traceability. This created some challenges for cooperatives that were sourcing from farmers further away.[277]

Challenges in coffee include low farm productivity, price volatility, scarcity and quality of raw material, lack of business skills, and the weak position of suppliers and smaller market players.[278] Low income for producers is a barrier to youth entering this business.[279] There are also some concerns around environmental risks around CWSs, especially regarding waste management.[280]

> **"Sector challenges include insufficient matching materials, poor maintenance and pests/diseases that reduces the production per coffee tree. Also, NAEB doesn't have district-level representatives, it only trains local agronomists. Unstable global prices impact on farmers' income as does seasonality and COVID-19 which all affect the price of coffee".**
>
> Source: Staff of Government Body, Pathways Study Interview

274. Gathani, S., & Stoelinga, D. (2013) 275. Gathani, S., & Stoelinga, D. (2013) 276. Stone, A. (n.d.) 277. Shared Interest (2020)
278. AgriLogic (2018) 279. Baker-Woodside, M. (2020) 280. Ya-Bititi, G. M., Lebailly, P., & Mbonyinkebe, D. (n.d.).

Tea

Rwanda's annual tea production is over 25,000 tonnes (dry tea) and is produced on 26,000 hectares of land,[281] which is either hillsides at a high altitude (between 1,900 and 2,500 metres), or drained marshes (altitude between 1,550 and 1,800 metres).[282] Following the implementation of the National Tea Strategy (2009), tea has become one of the largest export areas (alongside mining and coffee).[283] The majority (75%) of production comes from private tea factories[284] and contributes to 15% of export earnings.[285] Some 15 tea factories are operational and half of these are located in the Western Province of Rwanda.[286] Tea factories and estates were previously government-owned but were privatised in 2012.[287]

> **"Tea growing is like a well that never runs dry or like a cow that produces milk endlessly (Inka Idateka). It's a well that produces water all the time - from January to December."**
>
> Source: Industry Union President (Tea), Pathways Study Interview

The main tea produced is bulk cut, tear, curl (CTC) black tea, which is handpicked and processed in tea factories, packaged, and sent to the Mombasa tea auction (the second largest in the world) where it is sold for international export. Packaging materials are generally sourced from Uganda or Kenya.[288] A licence is required to export tea, which is obtained from the NAEB.[289] Almost all (98%) of the exported tea is exported in raw form, with most (70%) sold at auction.[290] Value addition for domestic consumption is generally done through packaging and processing. Most of the tea consumed locally (99%) is black tea, with only 1% of tea sold locally being green tea.[291]

Factories cluster around tea cultivation areas as tea harvests need to be processed within a few hours.[292] A factory typically controls a plantation of a few hundred hectares in its vicinity and employs a few hundred workers on wage contracts. Most tea factories are embedded tea factories (majority owned by foreign investors, and in co-ownership with local cooperatives). Other factories are owned by tea investment groups; the Rwanda Mountain Tea (RMT) is the largest investment group in Rwanda, with several subsidiaries and investments (including a tea packaging company).

281. Ministry of Agriculture and Animal Resources (MINAGRI)a (n.d.). Accessed in April 2022
282. National Agriculture Export Development Board (NAEB). (2012) 283. Gathani, S., & Stoelinga, D. (2013)
284. World Bank (2011b) in Gathani, S., & Stoelinga, D. (2013) 285. Beverage Daily (2019)
286. Ministry of Agriculture and Animal Resources (MINAGRI)b (n.d.). Accessed in April 2022
287. International Fund for Agricultural Development (IFAD) & Institute for Development Studies (IDS). (2015)
288. Gathani, S., & Stoelinga, D. (2013) 289. Women Connect (n.d.). Accessed in April 2022 https://www.womenconnect.org/web/rwanda/export-info/licences/-/asset_publisher/3Lw6yINm4Ea0/content/export-license
290. Ministry of Agriculture and Animal Resources (MINAGRI)b (n.d.). Accessed in April 2022
291. National Agriculture Export Development Board (NAEB). (2012)
292. IFSD (2005) in Gathani, S., & Stoelinga, D. (2013)

Factories within these groups have their own ownership and management structures.[293]

The International Fund for Agricultural Development (IFAD) estimates that over 400,000 people derive at least some income from direct activities in tea production.[294] Indirectly, tea provides livelihoods for more than one million people.[295] Although recent data is limited, tea factories employed an estimated 50,000 workers in 2011.[296]

> "COVID-19 reduced sales and income. Global customers were buying cheap, domestic coffee instead of buying more expensive, higher quality imported coffee from Rwanda - because their incomes reduced.
>
> Prices have gone down as well. In good conditions, the farmer gets 50% of the price at the international market. When the price changes at international level, the producer receives less."
>
> Source: Industry Union President (Tea), Pathways Study Interview

Most tea farmers (70%), including those belonging to cooperatives and associations, work on smaller plots (0.25 hectares on average) surrounding factories' estates.[297] Over 40,000 tea farmers work in 12 districts, primarily in the Northern, Western and Southern Provinces.[298]

Cooperatives can privately co-own tea factories, or fully own them, as in the case of the Mulindi factory (Gicumbi district, Northern Province).[299] Factories can play an important price stabilisation role for individual producers and can support smallholders with additional services such as financial incentives and professional support services.[300] However, a Pathways Study interviewee (representative of an industry union/association), shared that smallholder farmers who are not part of cooperatives often receive low prices due to low bargaining power.

The tea federation Fédération Rwandaise des Coopératives des Théiculteurs is a member of the National Cooperative Confederation of Rwanda (NCCR).[301] As at 2013, the federation comprised 18 cooperatives, and five unions with 35,000 members.[302] In some cases, tea factories have set up labour agreements with trade unions.[303]

293. Gathani, S., & Stoelinga, D. (2013)
294. IFAD (2010) in UNCTAD (2014)
295. Republic of Rwanda (2011c) in UNCTAD (2014)
296. Republic of Rwanda (2011c) in UNCTAD (2014)
297. Gathani, S., & Stoelinga, D. (2013); Adeyemi, E. I. (2018)
298. Ministry of Agriculture and Animal Resources (MINAGRI)b (n.d.). Accessed in April 2022.
299. Iriza, D., & Africa News (2022)
300. UNCTAD (2014)
301. National Cooperative Confederation of Rwanda (NCCR) website. Accessed in April 2022 https://nccr.coop.rw/spip.php?rubrique4
302. IFAD (2013)
303. Frøslev, L., & Rosdahl, J. (2015

Challenges faced by tea farmers include under capacity of tea factories due to limited and poor quality of green tea leaves,[304] limited access to fertilisers for small growers, limited industrial skills and limited processing capacity, limited basic infrastructure (for example, roads), and low sale prices for unprocessed green leaves.[305] The COVID-19 pandemic led to harvest losses; almost half of the tea that was to be sold was damaged/wasted because of the lockdown. According to a Pathways Study interviewee (representative of an industry union/association), international prices also decreased throughout 2020 and remained low in 2021.

> "COVID-19 has affected export and price, and this also affects farmers' salaries, women included. Several coffee exporters reported being affected by supply-side bottlenecks like labour shortages and costly freight charges attributed to COVID-19. Rwanda addressed COVID-19 supply disruptions by mobilising farmers to improve production and sensitising producers to do their best to meet the high-quality standards of speciality coffee markets."
>
> Source: Staff of Government Body (Pathways Study Interview)

Women's roles in the coffee value chain

Coffee

Cash crops are generally dominated by men, but coffee has become an important source of income for women, especially since the 1994 genocide against the Tutsi when shifting gender roles meant that more women stepped into farming crops that were traditionally farmed by men. Although more recent data is limited, women represented 30% of coffee farmers in 2009,[306] and the number of women farmers increased by 25% between 1992 and 2007.[307]

On coffee farms, both men and women work on planting and mulching. However, men tend to be solely responsible for clearing land, planting seedlings, stumping and pruning the coffee trees, as well as pesticide and fertiliser application.[308] A mixed-method study (2018) in the Nyamasheke district (Western Province), where the dominant cash crops are coffee and tea, found that men are more likely to participate in planting, collection and stock taking, and are in charge of using machines and providing security, while women are more involved in harvesting and drying.[309]

304. Gathani, S., & Stoelinga, D. (2013) 305. Adeyemi, E. I. (2018)
306. OCIR CAFÉ (2009) in Elder, S. D., Zerriffi, H., & Le Billon, P. (2012)
307. Verwimp & Nillesen (2007) and OCIR CAFÉ (2009) in Elder, S. D., Zerriffi, H., & Le Billon, P. (2012)
308. AgriLogic (2018) 309. Bayisenge, R., Shengde, H., Harimana, Y., Karega, J., Nasrullah, M., & Tuyiringire, D. (2019)

> "90% of women working in coffee projects in Rulindo district, cultivate, wash and handpick. Women themselves and the broader community are most comfortable with women being in those low(er) paying activities.
>
> Men often work in tree renewal, coffee transportation, machine operation and chasing insects (spraying chemicals)."
>
> Source: Coffee Union Representative (Pathways Study Interview)

Harvesting and transporting coffee from farms to the CWSs is seen as a women's job, although it is done by men as well. Marketing and sales, however, is generally done by men. [310] A study in Nyamasheke district (Western Province), found that 79% of farmers involved in selling/exporting were men.[311] In cooperatives, women are generally involved in drying and sorting, while men work on carrying and weighing coffee. [312]

Although there are no recent studies on the scale of child labour in coffee, evidence suggests that smallholder coffee farms rely on family labour. Children participate in picking and sorting coffee berries, pruning trees, weeding, fertilising, and transporting beans and other supplies. Children are more vulnerable to risks than adult coffee farmers, particularly in relation to carrying heavy loads, exposure to pesticides and dust, and injuries from sharp objects.[313]

Employment in the coffee sub-sector is highly seasonal and most temporary employees are women, while permanent staff are generally men. Workers are hired both by farmers and by CWSs. CWSs recruit thousands of seasonal employees (80% women) for three months of the year primarily for drying operations. It is estimated that there are about 2,000 permanent staff across all CWSs, and that up to 65,000 seasonal workers are employed in the sub-sector. Depending on the size of the CWS, there may be up to nine permanent management and technical staff (generally men), while between 50 and 250 temporary workers are hired during the harvesting season between March and July.[314] A survey in Huye district (Southern Province) found that almost all (98.3%) of seasonal workers (260 hired each year) were women, who work on a variety of tasks, including coffee picking and transportation, coffee sorting, treatment, drying, storage and marketing. By contrast, men were hired for physical tasks, such as operating machinery.[315]

310. AgriLogic (2018) https://www.cbi.eu/sites/default/files/cbi_vca_rwanda_coffee.pdf
311. Bayisenge, R., Shengde, H., Harimana, Y., Karega, J., Nasrullah, M., & Tuyiringire, D. (2019)
312. IFAD (2010) in AgriLogic (2018) 313. Vérité (2017) in AgriLogic (2018) 314. AgriLogic (2018)
315. Ya-Bititi, G. M., Lebailly, P., & Mbonyinkebe, D. (n.d.)

As most workers in CWSs work informally, they have little legal protection. Casual workers are generally employed to work seven days a week for at least 10 hours a day, for three to four months, with some night shifts for berry washing. Most of these informal workers have no contracts and earn between RWF600 and RWF1,000 (USD0.57 and USD0.96) a day. Labourers are generally low skilled, and many work on manual tasks.[316]

In both CWSs and cooperatives, men dominate managerial roles. In CWSs, permanent staff are generally men, and work as managers, machine operators and guards, while women are hired as cashiers. In cooperatives, women are found in management roles, as this is mandated by the cooperative laws (30% of women in leadership bodies). However, men tend to occupy higher management positions.[317]

It is estimated that about 30% of coffee farms are owned by women. Women who own farms are mostly either widows or young orphan girls who have inherited land.[318] A survey carried out in four coffee districts across the country (Rutsiro, Huye, Kirehe and Gakenke) found that in female-headed households, women tend to undertake some tasks that are generally carried out by men in other households, or they hire labour for these tasks. These include, for example, stumping, pruning and applying pesticide or fertiliser. The survey also found that female-headed households had lower productivity and used less inputs. Female-headed households were also more likely to be food insecure (92%, compared to 78% of male-headed households).[319]

Tea

Over half of all tea plantation workers are women,[320] who are concentrated in tea plucking roles.[321] While women are more likely to be hired to pluck and weed tea crops, men tend to work as supervisors, truck drivers or to load/unload bags.[322]

Despite being illegal, evidence suggests child labour is prevalent in smallholder tea farms.[323] Children are involved in all tasks of tea production, including preparing land, pesticide application and leaf harvesting. Children also reported gathering firewood for factories and other ancillary activities.[324]

Factors affecting women's economic empowerment in the coffee and tea value chains

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

316. AgriLogic (2018) 317. AgriLogic (2018) 318. UNCTAD (2014) 319. Feed The Future (2017a) 320. IFAD (2010) in Verite (2018)
321. Houser (2018) 322. IFAD (2010) in Verite (2018) 323. U.S. Department of Labor (2016) in Verite (2018) 324. Uncited in Verite (2018)

Summary of barriers to and opportunities for women's economic empowerment in the coffee and tea value chains

Barriers

Structural	Normative	Individual
Customary laws restricting women's land ownership	Coffee is seen as men's crop, although this is changing	Lower control over land, lower ownership of farms and smaller farm size
Limited legal protection for informal workers	Intimate partner violence including economic violence	Women have limited control over income
Limited childcare facilities	Sexual harassment in the workplace	Limited access to finance and credit
	Unpaid care and domestic work burden	Lower access to durable assets
	Restrictions on mobility and limited access to markets	Extension services are dominated by men
		Women's lower membership in cooperatives
		Women's constrained educational outcomes compared to men

Summary of barriers to and opportunities for women's economic empowerment in the coffee and tea value chains

Opportunities and entry points

Structural	Normative	Individual
30% leadership quota in cooperatives	Promoting more gender-equitable intra-household decision making and relationships	Building social capital through cooperatives
Fairtrade certification initiatives	Working with communities to tackle gender inequalities	Mobile money services for SACCOs
Rising demand for ethically sourced coffee	Presence of players who support women and women's coffees	Mobilising CWSs as social and collective locations where women can increase social and economic capital (in particular, CWSs remove key barriers such as access to processing facilities/ machinery, transport and markets)
Implementation of minimum guaranteed wage	Increasing women's access to markets through cooperatives	CWSs and tea farm schools provide training opportunities
Protection from sexual harassment	Prevention and response to gender-based violence sees it reduce when women's economic participation efforts are accompanied by household level interventions including men in the process	
Provision of childcare facilities		
Gender-responsive budgeting in agriculture		
Gender and family promotion commitments in NST1		

Structural factors

Rwanda is among the first countries in Sub-Saharan Africa to enact a law that provides equal inheritance rights for both men and women, through Law No. 22/99 of 12 November 1999.[325] However, customary laws and patriarchal traditions considerably impact its implementation. Although policies have been developed to improve land tenure security for women, research suggests that women are still discriminated against in decision-making processes about land and inheritance at village level.[326]

Customary practices and complexities with formal registration processes (such as the requirement for a formal marriage certificate for joint ownership) continue to hinder women's access to land, in coffee and other sectors. Lack of legal awareness is also a challenge.[327]

Rwanda implemented a programme of land tenure regularisation (LTR), as a low-cost intervention to clarify land ownership and resources post conflict. This programme improved access to land for legally married women.[328] However, an evaluation of the LTR programme found that although access to land was improved for legally married women, unmarried women were now less likely to have documented land ownership (a small but statistically significant reduction).[329]

Labour rights and working conditions in the formal sector are determined by existing labour regulations. These include Law No. 13/2009 of 27 May 2009, which mandates for rights such as contracts, wages, safety, trade unions, etc., as well as rights specific to support women, including non-discrimination, considerations to protect pregnant and lactating women, and maternity leave.[330] Other relevant legal instruments are Article 168 of the Rwandan Constitution, international and regional instruments ratified by Rwanda on labour rights and working conditions for women workers.[331] Women workers are protected against sexual harassment. This is indicated in Article 203 of the Rwandan penal code, which includes provisions for prison sentences and fines for offenders.[332]

However, most coffee workers are casual and informal,[333] and legal provisions do not regulate the informal sector, with some exceptions. As per the labour law (Article 1), only health and safety, social security and trade unions apply to the informal sector. For work carried out as part of family activities (Article 3), only prohibitions of child labour and of specific work for pregnant women apply.[334]

325. Rwanda Initiative for Sustainable Development (RISD), Global Initiative for Economic, Social and Cultural Rights (GI-ESCR), & ActionAid Rwanda (AAR). (2017) 326. Jones-Casey, Dick, & Bizoza (2014) in Gerard, A. (2020) 327. UNCTAD (2014) 328. Nyoga (2019) in OECD (2020) 329. Ali, D. A., Deininger, K., & Goldstein, M. (2011). 330. Tite, N. (2018) 331. Tite, N. (2018) 332. Organic Law No. 01/2012/OL of 2 May 2012 instituting the penal code, Official Gazette n° Special of 14 June 2012 in Tite, N. (2018) 333. AgriLogic (2018) 334. Tite, N. (2018)

> "Tea picking with children is an issue that needs more attention. Women have a low share of employment in tea activities due to having children, as those with children are not allowed to work in tea activities unless they put them in day care centres. There has been an instruction for all investors to construct a day care centre for children of women workers. Still, women are perceived as weak and lazy especially when they work while having a baby to care for."
>
> Source: President, Tea Industry Union, (Pathways Study Interview)

Although a minimum guaranteed wage (MGW) is mentioned in Article 76 of the new labour law, this has not yet been implemented. The article states that the MGW per category of work is to be determined by an Order of the Minister in charge of labour after collective consultations. This order has not yet been enacted.[335]

Health and safety risks in coffee processing are related to heat and sun exposure, or cold and humidity, manual tools, carrying heavy loads, exposure to pesticide and coffee bean dust, and noise and vibrations from machinery. However, health and safety measures are rarely in place.[336]

Plantations are not safe for workers' children, and there are generally no childcare facilities. However, NAEB and UNICEF have started working to address this gap by setting up crèches with trained child carers. This has in turn enabled women to work more days and hours a month.[337]

Normative factors

Coffee is still seen as men's crop, even though women do a large part of the labour.[338] Setting up washing stations is considered a man's role,[339] while women are overrepresented among washing station workers.[340] Gender norms also prevent women from working with machines in processing.[341]

In some cases, women (in coffee and tea) have limited control over the use of money earned, even on cash they earn from other subsistence crops that they sell in markets.[342] A 2017 survey (420 households) found that 57% of men received the money from sales of coffee farmed/produced by both spouses.[343] In some communities, inequitable intra-household dynamics still restrict women from benefiting equally from income gained in coffee or tea activities. Pathways Study interviewees suggested that, very often, men control women's incomes and sometimes instigate conflicts around women's earnings and how it should be spent. Fundamentally,

335. Tite, N. (2018) 336. AgriLogic (2018) 337. Houser (2018) 338. AgriLogic (2018)
339. Pathways Study Interview with Sector Stakeholder, Cooperative Representative
340. Pathways Study Interview with Sector Stakeholder, Private Company
341. Pathways Study Interview with Sector Stakeholder, Private Company 342. IFAD (2010) in UNCTAD (2014) 343. Feed The Future (2017b)

findings from Pathways Study interviews confirm that family patriarchal norms allocate the decision-making role to men, although women may also contribute to decisions about how to utilise harvest proceeds from the family's coffee and tea plantation.[344]

Social norms may discourage women from working in tea picking in some areas. According to a Pathways Study interviewee (tea stakeholder), norms around women's domestic responsibilities may deter women from the northern part of the country from working in tea, with women who work in tea plantations seen as transgressing these norms and facing criticism from their local community.[345]

When training and demonstrations (at CWSs or cooperatives) include gender sensitisation, training can be an enabler of improved community and household participation. For example, qualitative research undertaken in 2016 found that gender training provided by NGOs to households working at washing stations contributed to shifts in gender equitable attitudes and norms with women starting to shift towards undertaking tasks based on skills and household needs, rather than gender norms. Women participants highlighted a change in how women's work was valued and respected, and explained that they were regarded more equitably as active members of communities and households, including participating in economic and political decision making. Other study participants, including spouses, community members and staff of coffee washing stations, exporters and partners, identified women as "'knowledgeable' and 'powerful' individuals". The intervention also led to some positive shifts in norms around unpaid care responsibilities. It is also important to note that when men were excluded from training altogether, this promoted feelings of alienation, showing that engaging men is crucial for normative and household change.[346]

> **"Washing stations have many women compared to men due to the cultural gender role perceptions. There seems to be a defined gender role of washing and handpicking for women and the hard and technical roles of carrying and using machines for men. As women lead some of the washing stations, women's employment share may increase in the future due to the examples of those in leadership now."**
>
> Source: Manager, Private Company/ Coffee Producer (Pathways Study Interview)

344. Pathways Study Interview with Sector Stakeholders
345. Pathways Study Interview with Sector Stakeholder, Tea Industry Union/Association
346. Stone, A. (n.d.)

> **"It is key to involve/engage men in any solutions for women's economic empowerment because household dynamics affect women's economic access & opportunities - through their husband/community leaders."**
> Source: Private Company Representative, (Pathways Study Interview)

Some evidence suggests that women's increased participation in economic activities in CWSs, coupled with shifts in gender-equitable attitudes, has led to improved communication of couples around use of household income, and in some cases, a reduction of domestic violence. For example, a study in Karaba coffee zone (Huye district), noted that as women's economic and bargaining power increased, intimate partner violence decreased.[347] Another study found that women's increased paid employment from new coffee mills correlated with women's improved income and a reduction in domestic violence.[348] Similarly, USAID found that cooperatives sometimes served as "demonstration plots" for modelling gender relations differently. In Huye district, for example, cooperative member families reported increased shared decision making about the use of coffee income, men and boys becoming more willing to help with domestic tasks (although not in public), and men being committed to spending on family needs rather than alcohol, thus leading to reductions in alcohol consumption and associated gender-based violence.[349]

There are many players and initiatives that specifically focus on women's coffee and supporting women producers. Some examples are presented below.

Several stakeholders provide targeted support to women coffee farmers. For example:

- The NGO, Sustainable Growers supports women to organise themselves into (currently nine) cooperatives and produce and export their own coffee, which is sold with an additional USD1 (above standard prices) on the international market.
- RWACOF (a member of the Sucafina Group) promotes projects assisting women in coffee production and also partners with IMPETCOR to help women initiate alternative income-generating projects.
- In Rulindo district, international (Swedish) NGO Vi-AgroForestry helps women create cooperatives, trains them in coffee farming and processing activities, and provides pesticides and fertilisers.

347. Ya-Bititi, G. M., Lebailly, P., & Mbonyinkebe, D. (n.d.)
348. Sanin, D. (2021)
349. Blackden, M., Munganyinka, T., Mirembe, J., & Mugabe, A. S. (2011)

- In Abahuzamugambi Cooperative, Root Capital provides loans to women's cooperatives for income-generating projects to help farmers when stations are not working.
- The Relationship Coffee Institute (RCI), in collaboration with non-profit Bloomberg Philanthropies and US importer Sustainable Harvest, has focused on agronomy and capacity building of women coffee farmers, and has enrolled over 14,000 farmers over four years, and improved market access through the construction of two CWSs. As a result, productivity increased by 86%, and farmers' income increased by 137%.[350]

Some buying and processing companies or cooperatives are focused on supporting and branding women's coffee and supporting the communities they source coffee from.

- For example, Tropic Coffee, a female-founded Rwandan coffee processing and export company, sources almost half of its coffee from women farmers. Women-produced coffee is processed separately, and profits made from sales are used directly to support women and women's community groups through a "social fund". The company supports the establishment of coffee plant nurseries and provides advance payments before harvest. It also pays for farmers' health insurance, provides training of savings and supports education provision. The company has a fair price policy for speciality coffee.[351]
- COCAGI, a Fairtrade cooperative that also owns a washing station, introduced a separate brand of coffee produced only by women, and hires women to work at washing stations. The cooperative implements community development projects, for example training on product diversification and climate change, tree replanting programmes to prevent soil erosion, provision of milk for children and manure for coffee plants, and an education fund for school fees and materials.[352]

A number of digitally-focused initiatives exist in coffee in Rwanda, and these promote support to women-owned businesses as well as traceability of women's coffee. An example of this is the International Trade Centre trial of Farmer Connect technology (traceability) with a woman-owned coffee processor (Nova Coffee) engaged with 2,880 local small-scale farmers. The project also supports branding and digital presence of the processors it works with.[353] Another example is an open-source solution (INATrace) developed by the Initiative for Sustainable Agricultural Supply Chains (INA) and Anteja, which was implemented in Rwanda in partnership with the International Women's Coffee Alliance and Rwanda Smallholder Specialty Coffee Company (RWASHOSCCO) and aims to empower women's coffee cooperatives and to increase value chain transparency.[354]

350. Wallace, H.M. (2017) 351. Langdon Coffee (2022) 352. Shared Interest (2020)
353. Comunicaffe (2021) 354. Anteja (n.d.). Accessed in April 2022

Some gender-focused initiatives exist for tea farming as well

The Gender Monitoring Office (GMO) implements the "Promoting Gender Accountability in the Private Sector in Rwanda" (also known as the Gender Equality Seal Programme), with support from UNDP[355], UN Women and the Embassy of Turkey in Rwanda. Through this programme, public entities, and private companies (including tea companies) are engaged to mainstream gender in their activities and seek professional advice and monitoring from GMO. The programme started in 2017, and more than 50 companies, including tea companies, have shown interest and/or signing up.[356] For instance, in 2021, Mata Tea Company was recognised or promoting gender equality and accountability [357]

Individual factors

As most cultivation takes place in rural areas, where attendance or completion of school is not as prioritised for girls, many women in coffee and tea farming are not literate. According to a Pathways Study interviewee, this creates challenges in terms of understanding and following all the instructions related to planning, nurturing and managing plantations. This in turn limits women's efficient use of fertilisers, chemicals, the adoption of financial services and opportunities for increased productivity or expanded production.[358]

Land size, access to training and access to credit are all factors that influence women's ability to participate in the coffee sector.[359] Land is generally under the control of men, especially land for farming cash crops such as coffee or tea. Only 30% of family coffee farms are owned and managed by female-headed households, typically widows or younger orphaned girls.[360] For example, a mixed-method study in the Nyamasheke district (Western Province), where the dominant cash crops are coffee and tea, found that men own most (71.3%) of the land women work on.[361]

> **"Women are not as involved, as men as owners, but they have recently started to come. Initially the landowners were men as heads of family. But the recent land law has somehow changed the scene. We are currently seeing tea plantations registered for women. Women are the ones that currently are bringing new lands for tea ("kongera ubuso"), while men have been owners of land from the beginning."**
>
> Source: Representative, Tea Cooperative (Pathways Study Interview)

355. UNDP (n.d.)b 356. Pathways Study Interview with Sector Stakeholder, President, Tea Industry Union/Association
357. Gender Monitoring Office (GMO) 2021 358. Pathways Study Interview with Sector Stakeholder, Cooperative Representative
359. Umuhoza, G. (2012) 360. Republic of Rwanda (2008a) in UNCTAD (2014) 361. Bayisenge, R., Shengde, H., Harimana, Y., Karega, J., Nasrullah, M., & Tuyiringire, D. (2019)

Women's lower land ownership translates to lower decision-making authority around production and adoption of new technologies. In Nyamasheke district, most married women reported having to always discuss production issues with their husbands first, because their husbands owned the land. Whereas, women who owned their coffee-producing land (usually widowers or women who inherited land from parents), were able to make decisions on improving production by themselves.[362]

Female-headed households have less access to durable assets (radios, mobile phones or bicycles). For example, only 35% of female-headed households have a mobile phone compared to 49% of male-headed households. This inequitable access has severe consequences for women's economic opportunities in the sub-sector as coffee market information is often shared through radio and mobile phones. Bicycles are an important and convenient transport method to bring coffee to washing stations.[363]

A pilot initiative to introduce mobile money for members of SACCOs in the tea industry found a positive impact on productivity. The positive impacts of mobile money on SACCO members included reduced travel and waiting time on payment days, resulting in more time to engage in productive labour.

Women have lower access to extension services, which are male dominated and do not respond to practical needs and time constraints of women.[364] This results in men having higher access to advice from extension technicians/workers, and therefore higher skills and higher yields than women.[365]

CWSs often provide holistic training opportunities for producers focused on technical skills (pruning, fertilisation and pest control methods, home composting, sanitation, gender equality) as well as soft skills such as household communication and negotiating skills. Women producers perceived that their improved skills contributed to their income-earning ability, which in turn contributed to improved couple communication around use of household income.[366]

Women farmers also participate in tea farmer field schools. Farmer field schools are a form of group-based "learning-by-doing" process, where farmers meet weekly with field facilitators. Notably, these training programmes are accessible to women organised around their existing domestic labour commitments.[367] The Ethical Tea Partnership (ETP) runs a practical year-long training programme for tea farmers, focused on effective agricultural techniques. In 2018, 47 field schools were set up, reaching 1,500 farmers, of which a third were women.

362. Bayisenge, R., Shengde, H., Harimana, Y., Karega, J., Nasrullah, M., & Tuyiringire, D. (2019) 363. UNCTAD (2014)
364. IFAD (2010) and Republic of Rwanda (2010a, 2013b)in UNCTAD (2014)
365. IFAD (2010) in UNCTAD (2014) 366. Stone, A. (n.d.) 367. UNCTAD (2014)

Almost all (92%) participants had increased profits compared to the previous year. Farmers are also taught to grow other crops, to diversify their income and diets. Almost all (98%) farmers who completed their training reported that their lives had improved because of the initiative. ETP also facilitates the establishment of VSLAs, where women occupy almost 20% of leadership roles.[368]

CWSs have played a key role in addressing processing, transportation and marketing barriers for farmers,[369] creating opportunities for increased women's participation in the sector.[370] Aside from providing opportunities for training, CWSs have mechanised the pulping process (previously done by hand, with rocks), centralised the sales point, eliminated the distance to markets, and provided opportunities for accessing assets. Women's commercial engagement with CWSs makes coffee production work safer, more visible and more profitable.[371] As coffee farming is done mainly in rural, mountainous areas with limited large-scale community infrastructure, CWSs offer an opportunity for interaction.[372] Through accessing these communal spaces, women are able to congregate and access new sources of social, technical and financial support.[373]

In both coffee and tea, women's cooperative membership is lower than men's, and their participation in cooperatives is limited. A mixed-method study in the Western Province - Nyamasheke district, found that across various sectors,[374] over twice as many men engaged in cooperatives generally. It was only in one out of a total of 19 cooperatives sampled across 12 districts where women members of cooperatives exceeded male members.[375] In another study, about a third of members in two cooperatives that co-own factories in the Southern Province (in Nshili and Mushubi) were women (38% and 28%, respectively).[376]

> "Our cooperative engages in coffee farming, and we have washing stations, with almost half of our 1,363 members being women. Both women and men are encouraged to contribute to the cooperative development and gain benefits of work equally. However, women sometimes have low self-confidence to initiate high income projects."
>
> Source: Representative, Coffee Cooperative (Pathways Study Interview)

368. Ethical Tea Partnership (ETP) (n.d.). Accessed in April 2022
369. Stone, A. (n.d.)
370. Ya-Bititi, G. M., Lebailly, P., & Mbonyinkebe, D. (n.d.)
371. Stone, A. (n.d.)
372. Boudreaux & Ahluwalia (2009) in Daniels, S. (2021)
373. Stone, A. (n.d.)
374. In Rwanda, at administrative level, provinces are divided into districts which are in turn divided into sectors. Sectors are in turn divided into cells and cells are divided into villages.
375. Bayisenge, R., Shengde, H., Harimana, Y., Karega, J., Nasrullah, M., & Tuyiringire, D. (2019)
376. International Fund for Agricultural Development (IFAD), & Institute for Development Studies (IDS). (2015)

However, female-headed households are more likely to join cooperatives. A survey carried out in four coffee districts (Rutsiro, Huye, Kirehe and Gakenke) across the country found that 62.5% of female-headed households (118 out of 189) had joined a cooperative, compared to 54% (449 out of 835) of male-headed households. [377]

In some cases, women farmers have formed women-only cooperatives, and focus on exporting coffee branded as "women's coffee". As of 2018, only 5-8 cooperatives were led by women. These cooperatives supply berries to CWSs, which is sold as "women's coffee".[378] For example, in Huye district (Southern Province), a Fairtrade-certified coffee company is managed entirely by women. Angelique's Finest comprises six cooperatives with almost 3,000 women farmers benefiting from collective production and processing, leading to women earning 55% more than if they had sold beans as green coffee.[379] Cooperatives have been an enabler for women accessing the sub-sector and are playing a key role in restoring relationships between ethnic groups.[380] A survey in Nyamasheke district found that women's participation in coffee cooperatives increased their self-confidence and level of household decision making.[381]

When women join cooperatives, they find that their interests are protected and that they are supported in their activities. For example, data from a coffee cooperative in Huye district (Southern Province) shows that the majority (89.7%) felt that they got better conditions from membership, including monetary advantages, while two thirds (67.3%) had received access to facilities and agricultural inputs. More than half (58.1%) of women reported having gained leadership and business skills, while 67.8% stated having developed greater independence and improved their social status. The survey also found that more than half of women (58.1%) reported increased financial autonomy and independence. The cooperative also supports members joining Savings and Internal Lending Communities (SILC)[382] and accessing loans.[383]

> "There are teachings on gender and women's empowerment in the cooperative. What prompted the cooperative leadership to undertake such teachings is the requirements of supporting organisations/donors (Rainforest Alliance) that audit them. When cooperative leadership is being monitored, the questions on gender and women's empowerment always come back."
>
> Source: Representative, Tea Cooperative (Pathways Study Interview)

377. Feed The Future (2017a). (Note: 18.5% of the sample were female-headed households) 378. AgriLogic (2018) 379. Fairtrade International (2022) 380. Boudreaux & Ahluwalia (2009) in Daniels, S. (2021) 381. Bayisenge, R., Shengde, H., Harimana, Y., Karega, J., Nasrullah, M., & Tuyiringire, D. (2019) 382. Catholic Relief Services CRS (n.d.). Savings and Internal Lending Communities (SILC) is a microfinance approach of the Catholic Relief Services (CRS) 383. Ya-Bititi, G. M., Lebailly, P., & Mbonyinkebe, D. (n.d.)

Fairtrade aims to increase women's economic opportunities with different strategies, including the Women's Schools of Leadership, focused on improving business, negotiation and finance skills, and supporting women taking on leadership and committee roles within their cooperatives and communities.[384] Globally, approximately 15% of the 656 members of Fairtrade-certified coffee organisations are women.[385] From a survey of Rwandan coffee farmers, the majority (65%) of farmer members of Fairtrade-certified cooperatives perceived that women's participation in decision making was increasing. In comparison, only 27% of non-Fairtrade cooperative members, and 50% of producers selling to private coffee stations perceived similar shifts in women's participation in decision making.[386]

Recommendations

1. **Strengthen coffee and tea sub-sector's commitments to gender equality.**

Recommended strategies include:

- Support industry actors, including international buyers, to commit to policies, regulations and actions that further gender equality, and monitor gender equality commitments.
- Ensure cooperative development organisations are well trained and available to cooperatives for guidance on governance, member engagement, cooperative finance, etc.
- Global NGOs in partnership with global commodity buyers of coffee and tea (including retail chains and café brands with retail/customer facing channels) should support women farmers and women cooperatives (or the plantations/factories/exporters that they produce for) by linking them to state agricultural departments of key export countries to establish trade links for improved market access. The NGOs should ensure that a minimum farm gate pricing system is implemented (and monitored) to ensure that the benefits of new trade reach the grassroots women farmers/cooperatives.
- Engage with actors that are providing economic incentives for coffee produced by women and on women-owned land. This may be a price premium or priority for coffee that can be traced back to the farm (or trees) owned and controlled by women. Similarly, promote differentiation of women's coffee as a distinct brand of ethical coffee to increase demand and increase opportunities for women in this area.
- Leverage existing initiatives, including Fairtrade certification schemes, and initiatives working to build specific skills (such as agronomy) among women in the sector. Support scaling up of existing successful initiatives.

384. Fairtrade International (2022)
385. Fairtrade International (2022)
386. Elder, S. D., Zerriffi, H., & Le Billon, P. (2012)

- Improve accountability in the sub-sector by improving implementation and monitoring of labour laws in coffee washing stations and tea factories such as through participatory community-based monitoring systems.
- Encourage government support for pregnant and lactating women. This can be done by implementing a law that mandates coffee/tea plantations and factories to provide (subsidised) on-site childcare facilities for babies under one year and early childhood development (ECD) centres for children aged five and below and/or not yet of school age, and/or by encouraging employers to provide *gutwita* (meaning pregnancy) shaded rest areas for scheduled breaks and to also prioritise their readmission to work when they are ready to return.
- In collaboration with UNDP Rwanda, the Rwandan government can consider awarding the "Gender Equality Certification" to qualifying private companies (e.g. exporters), plantations, and factories that implement or support the implementation of these childcare and pregnancy-related provisions.
- Address child labour in the sector. Potential strategies can include advocating for increased implementation and monitoring of child labour legislation and promoting a zero-tolerance approach, promoting use of social compliance tools (such as codes of conduct), and implementing social norms behaviour-change campaigns.
- The Rwandan government should collaborate with financial institutions to develop a "COVID-19 relief scheme" that supports loan beneficiaries to gradually repay bank loans for obligations that they could not meet due to the COVID-19 pandemic.

2. Work with market actors including the government to improve the reach of interventions to women farmers and to tailor support to women farmers' needs.

Recommended strategies include:

- Improve women farmers' access to finance. Tailor financial product terms, timing and collateral requirements, and develop alternative products targeted at women. Provide training on basic financial literacy and/or mentoring alongside financial products including establishing credit reference bureaus for women. Support women's access to mobile money accounts to receive payments of earnings or sales. SACCOs can play a role in supporting access to finance and financial services.

- Support and engage with buyers and sellers, or initiatives that source and market coffee produced by women, or coffee produced under initiatives that promote gender equality through gender sensitisation.
- Support women-led cooperatives and companies to differentiate their brand of women's coffee as a unique ethical product.
- Set up infrastructure and services targeted at smallholder farmers, in both coffee and tea, to support commercial viability, quality and quantity of produce, and especially for women. This should include support for access to inputs (fertiliser, seeds, irrigation and electricity), as well as improvements to access extension and training services in rural areas. Extension services and training should consider skills/knowledge most useful for women, and design training (including timing and locations) to ensure accessibility for women around domestic responsibilities. Training materials should be developed in Kinyarwanda, French and English, including audio and visual delivery methods.
- For women-owned coffee/tea planting cooperatives, the government and local NGOs should develop training material (in Kinyarwanda, French and English) and train sector-level champions who will conduct practical walk-through sessions (per village) demonstrating commodity-specific agricultural best practices for rural women. This would help address the issue of low education or literacy levels that hinder effective plantation management principles.
- Recruit women extension agents and women facilitators for farmer field schools and train all agents and trainers (men and women) to provide inclusive services.
- Government facilitation for input supply companies' investment in rural areas; for farmers' ease of access to inputs and training in product knowledge.
- NGOs to facilitate partnerships between the private sector (including financial institutions) and cooperatives, to formulate contract farming mechanisms for sustainable access to much-needed capital.
- NGOs to consider forming/supporting youth groups, in partnership with input supply companies, for training on agronomy skills. Such groups could provide paid labour to cooperatives, thus helping manage/reduce child labour, while simultaneously creating employment for youth.

3. **Work with employers to promote gender-sensitive and safe workplaces (tea factories and their estates, and coffee washing stations).**

Recommended strategies include:

- Endorse and implement gender commitments, which should include gender-sensitive policies, staff training, setting up of anonymous grievance mechanisms, and the establishment of gender, health and safety, and welfare committees.
- Work with coffee working stations and tea factories to address informal work, wages and working conditions, including health, safety and childcare provisions.
- Work with cooperatives and employers to support women in supervisory and management roles through targeted leadership training.
- Implement initiatives to increase interest in hiring women in non-traditional roles and sectors, such as initiatives focused on showcasing women role models and creating mentorship opportunities.

4. **Improve women producers' human, social and economic capital through leveraging collectives and cooperatives.**

Recommended strategies include:

- Support women through collectivisation, leveraging existing women's cooperatives and supporting the formation of new women-led cooperatives. Cooperatives can support members to access "livelihood bridge funds" during periods of low harvest, or funds targeted at women.
- Leverage women's cooperatives and collectives for human capital interventions, including efforts to improve soft skills around leadership, negotiation and conflict management; as well as efforts to improve business capabilities, of members and staff.
- Leverage cooperatives, farmer field schools and places where women meet collectively to share information on markets and opportunities.
- Provide cooperative members with digital financial training as well as literacy training to increase the knowledge and confidence of using mobile money services.
- Support cooperatives' access to input distribution networks, post-harvest facilities and markets, as well as to time-saving innovations and technologies.
- Improve women's access to land through cooperatives. This can be done, for example, by starting a land warehousing/accumulation scheme whereby large tracts of land are allocated (by the government) and then leased to women coffee/tea cooperatives through an out-grower model (with each woman farming

an allotted/clearly defined area). These initiatives can be further supported by establishing off-takers/bulk buyers for their produce when harvested.

- Leverage private sector co-investment in aggregation and collection centres at farm level.
- Promote women's participation in mixed-gender cooperatives, through promotion of inclusive organisational cultures, as well as explicit and intentional strategies, which promote women's participation in leadership, women's voice and participation to decision making, and address discrimination and barriers along the value chain.
- Targeted interventions to improve women's voice, decision making and self-efficacy; more equitable norms around leadership and land rights; and opportunities for women to move into new or upgraded roles.
- Support women's cooperatives to utilise the Warehouse Receipt System through commodity accumulation and transportation, with a view to holding to benefit from higher prices and/or using as security/collateral for credit (inventory financing).

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

Recommended strategies include:

- Support initiatives at the community level to strengthen women's access to formal land titling.
- Implement and scale up evidence-based livelihoods and economic empowerment models (such as the Indashyikirwa programme[387]) with coffee and tea households and communities. This includes:
  - VSLA initiatives coupled with gender-transformative interventions at the household level which increase women's access to and control over economic assets and access to financial services, promote their financial independence, reduce their vulnerability to economic and other forms of GBV, and support women's ability to seek services, including legal help, if required.
  - Engagement with opinion leaders to advocate for greater gender equality in local communities.
  - Household dialogues or other behaviour-change interventions that address income negotiation, support women's involvement in decision making around how to spend coffee and tea income and encourage men's increased use of income to support

387. The Prevention Collaborative. (2019)

household expenditure (such as children's welfare).
    - Initiatives which address gender inequitable attitudes and norms including around gender roles in the value chain and women's mobility within the household.
    - Initiatives which address drivers of economic violence including land and asset dispossession and strengthen GBV responses services.
- Monitor, track and mitigate against any signs of backlash including increased rates of gender-based violence.

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

Recommended strategies include:

- Address women's unpaid labour burden within coffee and tea farming on smallholder farms through gender-transformative interventions at the household level including community sensitisation on the economic impact of women's contributions to the household economy especially when household responsibilities are shared.
- Support and promote labour- and time-saving innovations and technology via demonstration workshops in national languages (Kinyarwanda, English, French, etc.) to impart training of how to utilise them.
- Ensure that all interventions consider and mitigate risks such as increased unpaid work burden for women.
- Support local-level innovations to provide affordable childcare.

7. **Address research gaps and build evidence of what works**

Recommended strategies include:

- Commission and undertake participatory research to understand the barriers and challenges faced by different marginalised groups of women in the coffee and tea value chains including those with disabilities.
- Ensure rigorous monitoring of interventions to strengthen the evidence base on what works for achieving increased women's economic empowerment in coffee and tea for possible replication in other parts of Rwanda and beyond.
- Collect and use data to build the business case for increased gender equality in the sub-sector.
- Ensure meaningful participation of women farmers and/or employees in design of all interventions, including through participatory methods.

5.1.2 Green (French) beans

Sub-sector overview

Green beans, known as *imiteja*,[388] is a horticultural[389] crop grown for both domestic consumption and exports.[390] In 2013, the horticulture sector[391] (including most fruits and vegetables, cut flowers and other plants) accounted for 3.2% of national GDP and 9.7% of agricultural GDP.[392] In 2019/2020, horticultural exports generated USD28.7 million, an increase of 5% over the USD27.1 million generated in 2018/2019.[393]

Up to one million households grow some form of horticultural commodities, and for most rural households these provide important sources of nutrition, while the surplus is sold for household income.[394] The majority of vegetables are grown in household gardens, and less than 10% of vegetables are sold through horticultural organisations. On the domestic markets, most vegetables are sold directly to retail traders, although wholesale traders do exist and aggregate produce to sell at larger markets (in Kigali for example). Processors and speciality buyers tend to buy from horticultural organisations or the larger wholesalers. A few exporters also exist, who specialise in specific produce (including green beans).[395]

Rwandan companies started exporting green beans in the past decade.[396] Export values have fluctuated over the years, and, in 2020, green bean exports were worth approximately USD3.3 million.[397] The produce is exported fresh, and demand is steadily rising, particularly from Europe and the Middle East.[398]

> "Members of our cooperative are selling vegetables walking around urban households, transporting them in baskets. They can't sell in the general market (in Nyabugogo/Kigali City) because they are not professional producers, what they have is of low quality. They cannot compete with other producers from the northern part of the country. Nevertheless, their products are healthier and tastier because they mix industrial and natural manure rather than industrial manure only. Also, their products are always fresh since they are closer to (within) Kigali City, they take vegetables from the garden straight to the households for sale without spending much time between harvesting and consuming."
>
> Source: President, Horticulture Cooperative (Pathways Study Interview)

388. The New Times (2018) 389. InfoAgro (n.d.). Accessed in April 2022 390. NAEB (n.d.)b. Accessed in April 2022 https://naeb.gov.rw/index.php?id=112 391. As defined in the 2014 National Horticulture Policy, horticulture covers: a) fruits, including fruit bananas but excluding all other bananas; (b) vegetables, excluding Irish potatoes; (c) cut flowers (both summer flowers and exotic flowers including roses); (d) plants grown for the extraction of essential oils, other than pyrethrum; and (e) macadamia nuts. NAEB (2014) in Tite, N. (2018)
392. NAEB (2014) in Tite, N. (2018) 393. Fresh Plaza (2021) 394. Tite, N. (2018) 395. Westlake (2014) in USAID (2015b) 396. Defimedia (2017)
397. Knoema (2020). Accessed in April 2022 398. International Labour Organization (ILO) (2019)

As at 2016, four companies were producing green beans for export, while a small number of smallholders produce them mainly for the domestic market.[399] Green beans sold to local markets are sold for about a third of the price of exported (higher quality) green beans.[400]

Employers include farmers, cooperatives and exporters, and these provide both permanent and casual employment. Labour inputs at farm level are on average three full-time employees (FTE) per hectare (based on a survey of 40 farms), which is higher than employment per hectare for other non-traditional crops such as essential oils (1.06 full-time employees per hectare). Although modern agricultural practices are used for this crop, the labour force does not benefit from increased productivity, as wages for farm labour are similar to wages for farming other crops.[401]

Key sub-sector stakeholders include the National Agricultural Export Development Board (NAEB), as well as organisations and private companies supporting the horticulture sector, such as ICCO Cooperation,[402] the Sustainable Trade Initiative (IDH), and importers, as well as smallholder farmer cooperatives.[403]

Primary cooperatives in Rwanda can form cooperative unions. Cooperative unions in horticulture do exist (as of 2008, seven were registered). The law allows cooperative unions to form federations, and federations to form confederations or apex cooperative organisations.[404] This tiered structured allows for collective marketing as well as coordinated advocacy and access to other services from the apex organisations. One of these is the Rwanda Federation of Horticulture Cooperatives, which is in turn a member of the National Cooperative Confederation of Rwanda (NCCR).[405]

> "The district's agronomist monitors what the cooperative is doing with partners, including the type of contracts they have. The districts sometimes provides them with seeds (carrots, pepper and cucumber). Other seeds were provided by Rwanda Agricultural Board (RAB) (green beans, onions). RAB also practices the "Nkunganire" system through which a given percentage of input is paid by the government and the farmers receive them at low price."
>
> Source: President, Horticulture Cooperative (Pathways Study Interview)

399. Uncited in Ntezimana, J. (2016) 400. Cocchini, S., ter Steeg, E., & Boere, A. (2020)
401. International Labour Organization (ILO) (2019) 402. ICCO Cooperation (n.d.) 403. IDH (2018) 404. Mukarugwiza (2010)
405. NCCR website. Accessed in April 2022 https://nccr.coop.rw/spip.php?rubrique4

"Poor storage facilities lead to low prices for commodities especially during surplus/peak season. Cold room storage is key to store perishables and manage price/supply fluctuations.
Also, there are not many companies processing horticulture products - it is key to support start-ups in the processing stage of the value chain. It is key to address farm-to-market gaps: how to link farmers to supermarkets/ buyers. Farmers do not have a joint voice - they lose on price - as they are unable to negotiate."
Source: Representative, Community Development Organisation (Pathways Study Interview)

Some stakeholders support improvements in technical and management capacity and supply chain management, to support sector actors in meeting export markets requirements,[406] or provide access to finance to farmers and cooperatives.[407] Other non-governmental actors, Oxfam[408] for example, focus on supporting linkages between local farmers and export clients, helping farmers obtain better prices.

Green beans are primarily grown in the Northern and Eastern Provinces, as they require fertile and well-drained soils, ideally at high altitudes with average daily temperature of 15-18°C.[409] Compared to other agricultural value chains, there is a relatively small number of growers, and these are concentrated in the early phases of production.[410] Green beans represented only 1.3% of horticulture crops grown by individual large-holder producers in 2013.[411] Green beans processing (for example canning and freezing) is not yet available.[412] Challenges with post-harvest practices (rough handling, transport and lack of temperature management) result in high produce losses, and services for packaging, cooling or storing until market day are not available. Postharvest Training and Service Centres (PTSC) have recently been established through a project implemented by a private organisation to start addressing this gap.[413]

Green beans's potential for growth is constrained by the high cost of imported inputs (mostly from Kenya), climate instability, lack of appropriate infrastructure related to irrigation and the small amount of arable land available to cultivate. Specifically, the cost of imported inputs is prohibitively expensive for many women - 1kg of pesticide costs RWF140,000 (USD147).[414] Despite the current high demand for green beans (suggesting sub-sector growth potential), lack of organisation and communication across the sub-sector leads to

406. IDH (2020) 407. ICCO Cooperation (n.d.) and IFAD (2019) 408. Oxfam in Rwanda (2021). Facebook post. Accessed in April 2022
409. Cocchini, S., ter Steeg, E., & Boere, A. (2020) 410. International Labour Organization (ILO) (2019) 411. Clay, D., & Turatsinze, J. (2014)
412. NAEB (n.d.)b. Accessed in April 2022 https://naeb.gov.rw/index.php?id=112 413. Feed the Future (2019)
414. Pathways Study Interviews with Sector Stakeholders

suboptimal production. Some cooperatives' harvests are wasted or sold locally below market price, due to the unpredictability and inconsistent orders of larger purchasers.[415]

Horticulture farms were affected by COVID-19 restrictions, and this in turn impacted workers' livelihoods.[416] Urban women working in horticulture were severely affected by COVID-19 due to reduced customers. French beans are highly perishable and take longer to sell, while lack of adequate storage facilities increases the risks of loss or damage.[417]

> "One cooperative had clients in the UK but because of the lockdown, travel was no longer possible, thus their products were wasted. They had to sell them locally at a very low price. Because of COVID-19, even the few seeds they could receive from RAB came late, which caused irregularity in their production and reduced the harvest.
>
> Joining a registered cooperative may offer advocacy opportunities in case of limited movement affecting the harvest and trade of it."
>
> Source: Pathways Study Interview with Sector Stakeholder

The Rwandan horticulture sector relies on air freight by passenger flights, as it is a small sector and does not benefit from access to designated cargo planes. This meant that border closures related to the COVID-19 pandemic significantly restricted access to foreign markets for all horticultural produce, including green beans. The National Agricultural Export Development Board (NAEB), together with exporters and IDH, facilitated setting up cargo flights to address this.[418]

Women's roles in the green (French) beans value chain

Most green beans (and other vegetables) are grown in household gardens, some are used as food crops, but a significant quantity is sold for cash, mostly by women. Fresh produce must reach markets quickly, and women tend to be responsible for transporting produce to markets.[419] A Pathways Study interviewee explained that although men and women participate in all stages of production, men do more in ploughing/digging, while women dominate in harvesting and selling vegetables. However, when it comes to sales, women tend to retail locally (in baskets in their neighbourhood), while men tend to sell vegetables wholesale.[420]

415. Pathways Study Interview with Sector Stakeholder, President Cooperative
416. Hivos (2020) 417. Nkurunziza, M. (2021a) 418. IDH (2020) 419. Westlake (2014) in USAID (2015b)
420. Pathways Study Interview with Sector Stakeholder, Cooperative Representative

Women are overrepresented in horticulture[421] and in green beans production. Women are estimated to handle around 90% of green beans production/farming, mainly because it is culturally perceived as "suitable for them".[422] A study looking more specifically at both green beans and floriculture found that women constitute most of the workforce, whether in farms, cooperatives or companies, and are typically casual labourers earning low wages.[423] Most horticulture employers are also women.[424]

Although legal provisions exist to protect formal workers (see section below)**, working conditions in the horticulture sector remain undesirable, and women workers' rights are not guaranteed.** Since women are a considerable proportion of the informal labour force in the horticulture sector, they are often not protected under labour laws, and they tend not to be part of formal trade unions.[425] For example, most employees do not have a contract and are seasonal workers. Other issues highlighted include lack of implementation of provisions regulating work suitable for pregnant and lactating women, as well as lack of maternity leave and childcare facilities/breaks. In some cases, health and safety provisions are also not respected. Most firms are small, and 50% of employers state that lack of compliance is due to lack of resources.[426] In 90% of a sample of 11 horticultural companies, clean water was not available, and in some cases, separate changing facilities were not provided.[427]

Factors affecting women's economic empowerment in the green (French) beans value chain

The following table summarises available data and evidence on key barriers and opportunities for women's economic empowerment in the green (French) beans value chain, with further detail on available evidence provided further below.

421. Tite, N. (2018)
422. Pathways Study Interviews with Sector Stakeholders 423. Ntezimana (2016) 424. Tite, N. (2018)
425. Tite, N. (2018) 426. Tite, N. (2018) 427. Tite, N. (2018)

Summary of barriers to and opportunities for women's economic empowerment in the green (French) beans value chain

Barriers

Structural	Normative	Individual
Customary laws restricting women's land ownership	Men's higher social status and patriarchal norms	Workers in the horticulture sector have limited educational attainment
Limited labour law protection for informal workers	Women dominate in horticulture as prevalent norms dictate that vegetables are seen as "women's crops", however men tend to be more involved in decision making in crops that are more market orientated	Low ownership of land and limited access to land and durable assets
Weak implementation and monitoring of labour law in horticulture sector	Men tend to have more control over land, hold decision-making power and therefore control over family agricultural businesses	Women workers are often unaware of their labour rights
Minimum guaranteed wage provisions not implemented	Economic violence and other forms of intimate partner violence (IPV) restrict women's economic opportunities and wellbeing	Limited access to capital and credit
	Unpaid care responsibilities mean women often bring children to work	Limited storage facilities and low prices

Summary of barriers to and opportunities for women's economic empowerment in the green (French) beans value chain

Opportunities and entry points

Structural	Normative	Individual
Labour law sets out provisions to protect workers in the formal sector	Working with communities to tackle gender inequalities	Women's engagement in cooperatives including in leadership roles
The Penal Code addresses sexual harassment at work	Promoting more gender-equitable intra-household decision making as a preventative response to gender-based violence (including economic forms)	Increase women cooperatives' skills in value-added processing activities (for example canning and freezing) and improve storage and packaging practices
Gender-responsive budgeting in agriculture	Increasing women's access to markets through cooperatives	
Gender and family promotion commitments in NST1	Interventions aimed at reducing women's unpaid care burden and redistribution of household care and domestic responsibilities	

Structural factors

Customary law means that women have lower access to land for agribusiness. A Pathways Study interviewee explained that despite laws stipulating equitable ownership of land, in practice women continue to be discriminated against in access to and ownership of land. This means that women lack authority to make decisions about their land to expand their agribusiness, relying on the permission and support of their husbands.[428]

Horticultural labour rights and working conditions in the formal sector are determined by existing labour regulations. These include Law No. 13/2009 of 27 May 2009, which mandates for rights such as contracts, wages, safety, trade unions, etc., as well as rights and provisions to support women, including non-discrimination, considerations to protect pregnant and lactating women, and maternity leave.[429] Other relevant legal instruments are Article 168 of the Rwandan Constitution, international and regional instruments ratified by Rwanda on labour rights and working conditions for women workers.[430] Women workers are protected against sexual harassment. This is indicated in Article 203 of the Rwandan penal code, which includes provisions for prison sentences and fines for offenders.[431]

Challenges with labour law implementation remain. Mixed-methods research (2018) in the horticulture sector found that laws have not been effective in protecting women workers in the sector and that working conditions remain challenging. Inspectors at district levels can receive labour disputes, but do not visit sites to check compliance with labour rights. No punishment exists for those who violate labour law, and no firms have ever been closed as a response to violations.[432]

Legal provisions do not regulate the informal sector, with some exceptions. A considerable proportion of women workers in horticulture work in the informal sector. As per the labour law (Article 1), only health and safety, social security and trade unions apply to the informal sector. For work carried out as part of family activities (Article 3), only prohibitions of child labour and of specific work for pregnant women apply.[433]

Workers in the horticulture sector are often not aware of their rights. Research in the horticulture sector found that three quarters of women were not informed of their rights by their employers, while employers stated that they did not believe this was their responsibility. Three quarters of women respondents also mentioned that in cases of labour rights violations, they stay silent to keep their jobs.[434]

428. Pathways Study Interview with Sector Stakeholder, Cooperative Representative 429. Tite, N. (2018) 430. Tite, N. (2018)
431. Organic Law No. 01/2012/OL of 2 May 2012 instituting the penal code, Official Gazette nº Special of 14 June 2012 in Tite, N. (2018)
432. Tite, N. (2018) 433. Tite, N. (2018) 434. Tite, N. (2018)

Although a minimum guaranteed wage (MGW) is mentioned in Article 76, this has not been implemented. The article states that the MGW per category of work is to be determined by an Order of the Minister in charge of labour after collective consultations. This order has never been enacted. Wages in the horticulture sub-sectors are determined by the commodity prices received by their casual employer, and wages vary between RWF800 and RWF1,500 (USD0.77 and USD1.44) per day. [435]

Normative factors

Women dominate in horticulture as prevalent norms dictate that vegetables are seen as "women's crops" grown for food consumption. However, men tend to be more involved in decision making in crops that are more market orientated reflecting men's higher social status and patriarchal norms.[436]

Men tend to have more control over land, hold decision-making power and therefore control over family agricultural businesses. A Pathways Study interviewee explained there is often a male bias in land distribution through cooperatives and associations. Men do not necessarily allow women to decide on, to initiate or to control a business on the family-owned land.[437]

Economic violence and other forms of intimate partner violence restrict women's economic opportunities and wellbeing. Pathways Study interviewees explained how husbands' control over household income presents significant challenges for women, sometimes escalating into other forms of physical violence. At the same time, cooperative membership may offer some protective effects for women by providing a safe space to share experiences and receive support from other members, as well as offering some protection of income they earn.

> "Husbands want to control women's income and this causes conflicts. When women don't have a voice on decisions related to the money they worked for, they are not motivated to expand their activities. Given stories of resolved conflicts, many women are joining cooperatives hoping to get safety and support from cooperative members in case they experience violence from their husbands. The sharing of GBV experiences related to managing income in their families has motivated cooperative members to resolve family gender-related conflicts that come with cooperative income brought by women at home."
>
> Source: Representative, Sector Cooperative (Pathways Study Interview)

435. Tite, N. (2018)
436. Interview with PSDAG Value Chain Specialist, cited in USAID (2015b)
437. Pathways Study Interview with Sector Stakeholder, Cooperative Representative

Unpaid care responsibilities mean that women sometimes bring children to work, even though childcare facilities are not provided.[438]

Individual factors

Workers in the horticulture sector have limited educational attainment. Three quarters of a sample of 77 women working in the horticulture sector did not have a secondary school education.[439]Furthermore, low business skills are a barrier for women traders**.** A study carried out involving 446 urban women traders in the horticulture sector highlighted that limited business skills was one of the key challenges faced.[440]

Women workers are often unaware of their labour rights. Mixed-method research in the horticulture sector included a sample of 77 women and 11 employers and found a lack of awareness among both employers and employees.[441] Workers are also unaware of dangers from chemicals such as fertilisers, detergents, oils, disinfectants and plant protection products. It was found that when such chemicals were used, workers were unaware of the dangers and how to protect themselves and their families.[442]

Challenges for women traders in horticulture are varied and include access to capital and covering costs. A survey carried out with a sample of 446 women urban traders in horticulture products (markets in the City of Kigali, and Rwamagana and Rubavu districts) found that issues women faced included challenges in covering costs (high cost of market space, cost of taxation, transport costs), and accessing financial capital (limited access to business financing, insufficient capital).[443] Other challenges for women traders are related to markets, where there is limited access to adequate storage facilities, and low market prices.[444]

> "Women are not free to initiate high-income projects as they need men's permission. This discourages them from seeking loans. Women are encouraged to create cooperatives that help them work on their esteem and share skills and experiences. This provides them opportunities to work individually or collectively but also to challenge the power relations at the family level. Once their self-confidence increases, they start to defend their rights. Many women managed to succeed in working with cooperatives and get bank loans to develop agricultural or business activities, increase their income and expand their projects like selling cloths and food, livestock, cultivating vegetables, handcrafts, fish selling, exporting, etc."
>
> Source: Programme Director, Agriculture INGO (Pathways Study Interview)

438. Tite, N. (2018) 439. Tite, N. (2018) 440. Nkurunziza, M. (2021a) 441. Tite, N. (2018)
442. Tite, N. (2018) 443. Nkurunziza, M. (2021a) 444. Nkurunziza, M. (2021a)

In the horticulture sector, just over half of members of groups are women. In 2014, 56.5% of the members of horticulture organisations (registered associations, non-registered associations, and cooperatives) were women.[445]

Women participate in green beans cooperatives, although less so in the largest cooperative. For example, a study carried out in 2016 identified eight cooperatives producing green beans. In six of these, women were either equally or more represented than men, although it is important to note that these are small cooperatives (between six and 56 members). In contrast, in the largest cooperative, only two women members were found (and 162 men).[446] Among horticultural groups, most are mixed gender, with less than 2% male-only cooperatives, and 5.6% female only.[447] In three cooperatives interviewed for the Pathways Study, women accounted for 50%, 60.7% and 70.9% of their members.[448]

> "People involved in green beans, especially in this cooperative mix production activities with saving groups. They save their money and use it to upgrade their work, rather than always using bank services, which are very costly. Savings groups are very important because they increase the stability of farmers in their business. They can be afforded by everybody even the less financially fit. Women involved in the saving groups therefore are likely to remain stable in their agricultural activities"
>
> Source: President of Cooperative (Pathways Study Interview)

Women also participate in leadership roles in cooperatives. Among eight cooperatives identified (in 2016), women participated in seven of the cooperative boards, and in one case the board members were six women and three men. In the largest cooperative, however, women were not represented at board level.[449]

Recommendations

1. **Strengthen green (French) beans sub-sector's commitment to gender equality.**

Recommended strategies include:

- Support implementation of labour laws and health and safety standards, increasing inspection visits and monitoring compliance for example through participatory community-based monitoring and accountability systems.
- Support industry actors, including international buyers, to commit to policies, regulations and actions that further gender equality, and monitor gender equality commitments.

445. Clay, D., & Turatsinze, J. (2014) 446. Ntezimana (2016) 447. Tite, N. (2018)
448. Pathways Study Interviews with Sector Stakeholders 449. Ntezimana (2016)

- Establish processing factories (e.g. via canning, freezing, drying) for export and domestic use. Promote hiring of women in non-traditional roles and link factories to cooperatives working with women or women producers.
- Provide subsidies for inputs in bulk quantities, to women-led cooperatives and producers.
- Designate quotas for allocation of marshlands for farming to women cooperatives producing food/cash crops including green (French) beans, while investing in water management and new technology to drain marshlands during flooding (to mitigate crop losses for farmers).
- Provide COVID-19 relief to women farmers and traders.

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

Recommended strategies include:

- Support initiatives strengthening women's access to formal land titling, coupled with community-level interventions to raise awareness of women's rights to land.
- Livelihood and economic empowerment initiatives coupled with gender-transformative interventions at the household level (including with male partners) and community level (with community leaders, village heads, etc.). This should focus on increasing women's access to and control over economic assets and access to financial services, promote their financial independence, reduce their vulnerability to economic and other forms of gender-based violence, and support women's ability to seek services, including legal help, if required.

3. Improve women farmers' human, social and economic capital through cooperatives and collective activities.

Recommended strategies include:

- Support women through collectivisation, leveraging existing women's cooperatives and supporting the formation of new women-led cooperatives.
- Support cooperatives to access wholesale markets, as well as export markets, through negotiation of supply contracts, and support value-added processing activities.
- Support women's cooperatives with improved production skills and investments in climate- resilient techniques, and to set up infrastructure and facilities for fresh food storage at markets and for transport (cold).
- Address women's transport-specific mobility constraints by supporting collective transport options for women to sell at markets.

- Support and encourage women members of green beans farmers' cooperatives to form village savings and loans associations (VSLAs) and access formal financial services (including lending, savings, insurance), by joining SACCOs. This can help them purchase (additional) land, processing machinery, and agricultural inputs (e.g. fertiliers, seeds) or access improved irrigation systems. Support SACCOs' access to mobile money platforms.
- Provide women farmers/cooperatives with technical and vocational skills in agriculture extension services and training to acquire entrepreneurial, managerial and business operation skills.
- Support and leverage investment in cold chain storage, processing (value addition) and transportation to manage perishability of green (French) beans, especially when there is fluctuating demand.

4. Facilitate women's access to finance through better products and services for farmers and employers.

Recommended strategies include:

- Work with financial providers to tailor products and services to women's needs, including utilising mobile money, and tailor communication and marketing strategies to reach women farmers.
- Telecommunications companies to design affordable products for farmers, with priority for women farmers.
- Financial institutions should tailor warehouse finance or invoice finance systems with the private sector, and make this available to women-led cooperatives. This could support women in accessing quality inputs, agricultural technologies and innovations (including climate-resilient and time-saving technologies) and crop insurance.
- Work with partners to increase women's access to digital technologies through digital skills training and promotion of platforms such as UN Women's "Buy from Women" digital platform[450] - which provides easier access to information, finance and markets to women farmers.

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

Recommended strategies include:

- Endorse and implement gender commitments, which should include gender-sensitive policies, staff training, the setting up of anonymous grievance mechanisms, and the establishment of gender, health and safety, and welfare committees.
- Address informality/casual work in the sector by providing formal contracts and living wages. For individual-level

450. UN Women (2017)

employers of casual labour, industry guidelines on informal labour should be enacted, disseminated and enforced in collaboration with grassroots level stakeholders including village heads.

- Encourage the use of job descriptions and other human resource management tools to ensure roles and responsibilities are understood by all, including those willing to invest in skills development to meet the minimum qualifications.
- Promote awareness of labour rights among workers, through training or drafting of simplified written material. Promote awareness of available legal aid.
- Implement health and safety measures; provide safety and protective equipment, especially for the use of chemicals such as pesticides and first aid.
- Promote awareness of health and safety among workers; facilitate first aid training for workers.
- Create facilities for day care and support mothers returning to work. Provide facilities or support to address sexual and reproductive health.
- Improve WASH (water, sanitation and hygiene) facilities, including providing separate facilities for women and men, and access to clean water and sanitation.

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

Recommended strategies include:

- Commission and undertake participatory research specific to gender in the green (French) beans value chain, to understand the barriers and challenges faced by different marginalised groups of women in the green (French) beans value chain including those with disabilities.
- Ensure rigorous monitoring of interventions to strengthen the evidence base on what works for achieving increased women's economic empowerment in the subsector.
- Ensure meaningful participation of women farmers in the design of all interventions, including through participatory methods.
- Commission and undertake research to understand the gendered impacts of COVID-19 on green bean farmers.

5.1.3 Fishing and aquaculture

Sub-sector overview

The fishing sub-sector is estimated to provide 200,000 jobs. The sub-sector has, however, remained artisanal and led by smallholder fishers and farmers. Other value chain actors include fishing supply shops, private companies (processing and trading), fish retailers, and buyers such as supermarkets, hotels and restaurants, and individual consumers.[451] Fish in Rwanda primarily comes from Lake Kivu and from smaller lakes such as Lake Muhazi, Lake Mugesera, rivers and swamps.

Aquaculture pond farming started being practised in the 1940s and is generally practised as either extensive or semi-intensive farming, with the use of manure or compost, often in combination with agro-livestock activities. Just over 200 aquaculture fish farms were active in 2017. Tilapia is farmed in over half of the aquaculture ponds. Other common farmed species are African catfish and common carp.[452]

Beyond overfishing and degradation of resources, other challenges that fishing and aquaculture faces include poor regulatory framework, lack of local leadership, lack of reliable data, inadequate cooperatives that are focused on harvesting, inadequate private sector investments in the sub-sector, lack of innovations and technologies, lack of sufficient quality inputs including fish feed in local markets, as well as high post-harvest losses and low domestic demand.[453] COVID-19 has added to these challenges. Although there was

> "Aquaculture is still not yet developed in many parts of the country, especially in Southern and Northern Provinces. Even in Eastern and Western Provinces, they mostly use natural water. The idea of digging artificial dams for fishing is not yet much developed. For fishing skills, since aquaculture is not yet extensively developed, not many people are trained to do it."
>
> Source: President, Fishing Cooperative (Pathways Study Interview)

> "Farmers in cooperatives maintain individual (aquaculture) ponds and this hinders the development of common interests. Insufficient seeds and food for fish, few (processing) industries and lack of appropriate equipment to transport fish are other challenges."
>
> Source: Government Board Staff (Pathways Study Interview)

451. Murera, A., Verschuur, M., & Kugonza, D., R. (2021)
452. Niyibizi, L., Vidakovic, A., Norman Haldén, A., Rukera Tabaro, S., & Lundh, T. (2022)
453. Agency for Cooperation and Research in Development ACORD (2017)

no tangible impact on fishing and selling locally, the pandemic disrupted the supply of equipment.[454] In addition, there remain safety concerns around Lake Kivu. It took almost two decades following the 1994 genocide against the Tutsi, for the area around Lake Kivu to be considered safe for night fishing. However, security risks remain, and risks of loss of life exist due to piracy and winds,[455] as well as the possibility of gas leaks triggered by nearby earthquakes which has the potential to be a significant natural disaster.[456]

Women's roles in the fishing and aquaculture value chain

Although fishing has traditionally been men's domain, this has started to change. Traditionally women were not involved in fishing, tending instead to home gardens. However, in Rwanda (after the 1994 Genocide against the Tutsi), women participate in capture fishing, by fishing on boats at night, even though this involves intense physical work and safety risks.[457] According to Pathways Study sector stakeholders, women who live near Lake Kivu are involved in selling fish, while men tend to dominate in fish farming/harvesting and exporting.[458]

Fish processing and product development are still done traditionally, and generally by women. Processing methods are traditional smoking and sun drying on lake beaches.[459] The artisanal nature of fishing is a barrier for product development, and most of the small number of fish caught is sold at the lakeside.[460]

> "Women participate in preparing fish and also selling them. Recently women started to participate in weaving the nets for fishing and welding metals used in fishing. Men participate in catching fishes from the water. They lay the nets/ traps in the afternoon around 4:00pm and return early the next day to collect the fishes. These instructions are widely respected."
>
> Source: President, Fishing Cooperative (Pathways Study Interview)

Data on women's participation and involvement in aquaculture is inadequate.[461] However, a survey of fish farms found that the majority of farms are owned by cooperatives (63%), and among the randomly selected sample, the majority (79%) of farm representatives were male. The majority (75%) also fell in the 31-55 years age group, and all respondents carried out fish farming as a side activity, complementing other employment.[462]

454. Pathways Study Interview with Sector Stakeholder, Cooperative Representative
455. Sims, S., Pickett, H., & Prat, C. (2018) New York Times 456. Jones, N. (2021) 457. Sims, S., Pickett, H., & Prat, C. (2018) New York Times
458. Pathways Study Interview with Sector Stakeholder, Cooperative Representative
459. MINAGRI (2011) in Mindje, M., Funmilola, A., Kibogo, A., & Ngirinshuti, L. (2018)
460. Shirajjee et al. (2010) in Mindje, M., Funmilola, A., Kibogo, A., & Ngirinshuti, L. (2018)
461. Mindje, M., Funmilola, A., Kibogo, A., & Ngirinshuti, L. (2018
462. Niyibizi, L., Vidakovic, A., Norman Haldén, A., Rukera Tabaro, S., & Lundh, T. (2022)

Women participate in marketing and sales activities for both capture fishing and aquaculture. Women gather on the shores of Lake Kivu to buy from fisherwomen. They then bring the fish to small villages or sell to cooperatives.[463] Women also participate in processing, transport and country-wide sales of lake fish. They manage drying stations in cooperatives to turn fish into more transportable products and are involved in transporting and selling fish across the country (in buckets and sacks) or sell fish in urban markets.[464] A study on the sardines value chain highlighted that all retailers are women.[465] In aquaculture, women participate in downstream activities such as post-harvest and marketing as fishmongers.[466]

Summary of barriers to and opportunities for women's economic empowerment in the fishing and aquaculture value chain

Barriers

Structural	Normative	Individual
Insufficient regulation of the informal sector	Norms define women's roles in sales and processing lake fish, and men sell wholesale Activities that require tools (owned by men) and that are perceived as physically hard are generally done by men (for example digging and pond harvesting). Risks of violence against and sexual harassment of women traders Aquaculture roles defined by social norms	Women's lower access to land (aquaculture) Constrained access to extension agents for training Migrants may experience challenges accessing social services Lower access to tools and equipment due to lack of funds Access to credit is lower, and approval from family members is required Women have limited market access

463. Sims, S., Pickett, H., & Prat, C. (2018) New York Times
464. Sims, S., Pickett, H., & Prat, C. (2018) New York Times
465. Murera, A., Verschuur, M., & Kugonza, D., R. (2021)
466. Niyibizi, L., Vidakovic, A., Norman Haldén, A., Rukera Tabaro, S., & Lundh, T. (2022)

"Women do not have a place to use for drying the small fishes. They are obliged to take them to their respective homes, which is unprofessional, and risky. There's also shortage of money to invest, for many reasons - they are ineligible for bank support for a long time because they had no legal standing as a cooperative. Also, the boat they were using was hired (~USD45 per month) but was stopped during the COVID-19 lockdown and was later damaged because of inactivity. But they were asked to pay it back and this was very heavy upon their finances."

Source: President, Fishing Cooperative (Pathways Study Interview)

Summary of barriers to and opportunities for women's economic empowerment in the fishing and aquaculture value chain

Opportunities and entry points

Structural	Normative	Individual
Land tenure regularisation improved access of married women to land	Improving intra-household dynamics of fishing and aqua pond households could give women more economic opportunities	Women-only cooperatives to support women's collectivisation
Gender and family promotion commitments in NST1	Women already dominate in transport and retail sales	nitiatives supporting women cooperatives engagement in aquaculture where women can "own" fish without having to encounter the risks associated with capture fishing and/or the lower margins associated with being only retailers
		Increasing women's skills and economic opportunities in secondary industries including fish feed and repairing of fishing nets

Recommendations

1. Strengthen fishing and aquaculture sub-sector's commitments to gender equality.

Recommended strategies include:

- Work with key stakeholders to build a gender-inclusive market differentiation programme to raise social standards in the sub-sector.
- Advocate with government for improved gender-responsive policies in the sub-sector, including upholding women's land rights linked to aqua ponds.
- Establish specific funds that support women and women's cooperatives working in aquaculture and fishing.
- Work with government to improve implementation of policies and laws in relation to labour rights and decent work, and advocate for ratification of the ILO Violence and Harassment Convention (No. 190).
- Support the implementation and monitoring of gender commitments of value chain actors, particularly working with international buyers and improving due diligence requirements and processes.
- Train and equip marine police to patrol lakes to discourage and uncover illegal fishing activities and to assure women of their safety on the water at any time of the day or night.

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

Recommended strategies include:

- Implement and integrate into current initiatives norm change interventions focused on women's role in fishing and aquaculture and promoting gender-equitable attitudes and norms.
- Support gender-transformative household-level interventions that address women's role and decision making in aquaculture tasks, land ownership and control, access to fishing associations, access and control over income, as well as unpaid care and childcare responsibilities.
- Monitor, track and mitigate against any signs of backlash in response to increasing women's involvement in non-traditional roles such as capture fishing.
- Implement interventions to build sub-sector-specific skills of women in aquaculture farming households.

3. Support interventions to improve the profitability and productivity of women's cooperatives.

Recommended strategies include:

- Support women through collectivisation, leveraging existing women's cooperatives and supporting the formation of new women-led cooperatives.

- Support women's leadership in the sub-sector, through cooperatives, unions and federations.
- Support existing and new cooperatives in improving processing activities (smoking fish) and access to market. Support cooperatives in negotiating prices with suppliers of fishing materials and equipment.
- Provide training to women and workers in the fishing industry, specifically on safety and hygiene (sanitation of fishing gear, hygiene and safety procedures of fishers, handling, storing and processing the fish, food safety standards).[467]
- Support the setting up of retailer cooperatives, to improve negotiation and margins in: (i) buying from fish sellers; and (ii) selling to end-consumers. Mobilise and support experienced fish retailers to share their knowledge about identifying good quality fish, negotiating prices, attracting new clients, and retaining existing clients with aspiring and new fish retailers. Key learnings could be documented in a training manual. In addition, cooperatives could engage with transport teams or buyers that can facilitate cross-border trade, thereby reducing the need for women to engage at the borders.
- Improve women's access to finance, including use of mobile money platforms. Tailor financial product terms, timing and collateral requirements, and develop alternative products suited to women. Funding can be provided to purchase motorised boats, or invest in equipment needed for fish processing, cold storage, and transport to domestic and cross-border locations.
- Leverage women's cooperatives and collectives for human capital interventions, including fishing skills and efforts to improve soft skills around leadership, negotiation and conflict management; as well as efforts to improve business capabilities.
- Improve women's access to extension services and training for aquaculture.
- Train women fishing cooperatives on aquaculture development and management and provide financial support to establish artificial lakes/dams and pools (on-shore aquaculture) and enclosed/fenced sections of lakes (in-shore aquaculture). Provide fingerlings of selected fish species to cooperatives starting these activities.

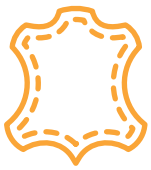
467. Food and Agriculture Organization (FAO). (2018)

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

Recommended strategies include:

- Given the dearth of research on women in fishing and aquaculture in Rwanda, commission and undertake research on barriers and opportunities for women in the sub-sector.
- Commission and undertake research with marginalised groups to understand the different barriers and challenges women may face, for example women with disabilities and migrants.
- Ensure meaningful participation of women in the design of all interventions, including through participatory methods.
-

5.2 Leather and leather products



Sector overview

Rwanda's leather sector (leather, leather products and footwear) is at an early stage of development in scale and scope, although it has been expanding since 2015, and the growth rate of its gross exports (2005 to 2017) was 13%.[468] As at 2021, there was only one large factory operating, although there are plans to build a tannery park in the same location (Bugesera district).[469] Another tannery exists but is not operational. A cottage industry exists, with two micro processing plants set up by one entrepreneur and one cooperative.[470]

The majority of raw materials (90% of hides and skin) produced locally are exported for processing.[471] Imported finished leather is sourced for local shoe and leather goods manufacturing.[472] The quality of imports, however, is inconsistent, creating challenges for the standards, quality and sustainability of locally-produced finished leather goods.[473]

The leather sector is a priority for the Rwandan government. The government's National Strategy for Transformation (NST1) (2017-2025) includes textiles, garments and leather as a key sector for strategic development.[474] A cross-government strategy was drafted in 2016, aiming at transforming the textile, apparel and leather sector, with the aim to contribute to the creation of over 5,000 jobs by 2020. Related initiatives focus on promotion of private direct investment, access to land in new economic zones, exemptions of key inputs from import tariffs, as well as support to new investors for training, technology upgrading and certification.[475] Initial results (besides increased investment - private and foreign), saw the acceleration of sectoral growth (from 3% in 2015 to 10% in 2016), with exports increasing from USD16 million to USD20 million.[476]

468. UNIDO elaboration based on UNIDO INDSTAT2 rev.3. in UNIDO (2020) 469. Nkurunziza, M. (2021b)
470. National Industrial Research and Development Agency (NIRDA). (2017) 471. National Industrial Research and Development Agency (NIRDA). (2017) 472. National Industrial Research and Development Agency (NIRDA). (2017) 473. Fashion Revolution (2021)
474. UNIDO (2020) 475. MINICOM (2017) in World Bank Group and Government of Rwanda (2020) 476. MINICOM (2017) in World Bank Group and Government of Rwanda (2020)

The Rwandan Ministry of Trade and Industry (MINICOM) designed the "Made in Rwanda" policy to promote locally-made and competitive export goods (including the leather sector) and set standards to promote these in collaboration with the Rwanda Standards Board.[477] Through this policy, and other government incentives, locally-produced leather products benefit from tax incentives, capacity building support, reduction in industrial electricity tariff and preferential selection in government tenders.[478] Other government-led initiatives to support the sector include the establishment of a Leather Community Processing Centre (CPC) and opening of incubation centres.[479]

Despite these initiatives, a recent study by Leather Apex Consortium of East Africa (LACEA), found that, in East African Community (EAC) countries, a weak policy environment discourages investing in value-added products such as leather goods or footwear.[480]

The main sources of raw materials in the leather sector in Rwanda are cattle, sheep and goats.[481] About 80% of raw materials are produced in rural areas, where basic amenities are lacking. 20% are produced in 388 slaughtering facilities, of which three are industrial abattoirs, 36 are slaughterhouses and 349 are rural slaughter slabs. Hides and skins are traded at the point of slaughter and are either used as slaughter fees or sold to the owner of the facility, who in turn sells them to merchants. Advance payments for hides and skins (from exporters to middlemen and/or slaughter facilities) have turned these materials into an important source of liquidity in the value chain, as they are sold and paid for pre-production, unlike meat.[482]

The production of raw materials for the leather industry (hides and skins) depends on the rearing, management and disposal of livestock. The government has also launched development farming programmes to improve the quality of leather raw materials.[483] However, in Rwanda, and other

"Experts in the sector have recommended emphasis on the production of good quality raw hides and skins through the development of a grading system and quality certification programmes and finally a pricing system that is dependent on quality grades to attract premium prices. Further, there is a need to develop the human capacity to enhance skills, set up a market structure, and create an enabling business environment to attract investment."

Source: Leather Industry Network (n.d.)

477. RSB (2019) 478. Ministry of Trade and Industry (2017) in Fashion Revolution (2021) 479. LIN (n.d.). Accessed in April 2022
480. Business Daily (2022) 481. NAEB (n.d.)c. Accessed in April 2022 https://naeb.gov.rw/index.php?id=159
482. NAEB (n.d.)c. Accessed in April 2022 https://naeb.gov.rw/index.php?id=159
483. NAEB (n.d.)c. Accessed in April 2022 https://naeb.gov.rw/index.php?id=159

East African Community (EAC) countries, improvement of quality standards through capacity building has focused on the formal sector, ignoring the informal sector and rural areas producing the raw materials. This results in poor handling and poor quality of raw materials (hides and skins), as well as less professional workmanship and systemic wastage.[484]

There is a deficit of workers trained in leather manufacturing.[485] Many artisanal tanners use traditional equipment, which impacts product quality and consequently value. There are also limited opportunities for on-the-job training or TVET, although a Pathways Study interviewee mentioned that a professional TVET leather school will soon be established in Gatsibo district (Gakoni TVET Leather School). While this is a positive development, a human capital development strategy is needed to ensure a consistent supply of highly skilled labour for manufacturing leather. In addition, there is a need for suitable management structures within tanneries, and the future success of the leather sector in Rwanda will depend on "capacity building for the whole industry, including training staff and management, and investing in research and development". [486]

> "A professional TVET leather school will soon be established in Gatsibo district (Gakoni TVET Leather School), and APEFE (a Belgian NGO supporting skills development and institutional capacity building in Rwanda) will be one of the funders of leather work equipment to the school."
> Source: Pathways Study Interview with NGO

From the stakeholder mapping exercise for leather and leather products, 29 stakeholders were identified across the various provinces of Rwanda. A summary table of stakeholder types across the regions is shown here, and the detailed information about stakeholders' activities (including women-focused provisions) can be accessed here on the Pathways Study website .

Leather and Leather Products Sector Stakeholders

Stakeholder type	Province				
	Northern	Southern	Eastern	Western	Kigali
Associations, collectives, organisations, representative bodies	6	3	3	5	11
Government agencies/departments	-	-	-	-	1
TOTAL	**16**	**27**	**16**	**34**	**27**

484. Business Daily (2022)
485. Pathways Study Interview with Sector Stakeholder
486. Pathways Study Interview with Sector Stakeholder

Other supporting stakeholders in the sector include consumers and suppliers of livestock; investors and the private sector (including abattoirs that produce hides and skins, tanneries, artisans); professional institutions, such as RAPROLEP (Rwandese Association for the Promotion of Leather and Leather Products), or the Rwanda Leather Value Chain Platform (RLVCP); vocational training institutions; NGOs and international institutions supporting industry development; and the government.[487] A multi-agency task force on leather has also been set up in Rwanda to promote the adoption of clean technologies along the value chain (from livestock keeping to the finished products) in response to wastewater disposal and environmental impacts. Members include the Rwanda Agricultural Board and Rwanda Standards Board.[488]

> "Across the region, there is a lack of adequate skills and knowledge on how to manufacture leather, inadequate infrastructure and operational environments for tanneries, and low standards in branding locally-produced leather products."
>
> Source: COMESA Interview by The East African Newspaper (February 2021)

There is limited data on the scale of employment in leather production. The manufacturing sector accounts for 5.8% of employment in the country, or just over 200,000 workers, of which about 40% are women.[489] About 71% of workers in manufacturing live in rural areas, just over half (51%) are own account workers, 44% are employees, paid apprentices or interns, 1.5% are employers, and 0.5% are members of cooperatives. The remaining 3% are unpaid family workers.[490] It is possible that as the leather production sector grows, employment will follow similar patterns.

COVID-19 has been a very serious threat to the leather sector. As artisanal leather workers import finished leather from Kenya and Tanzania, when the borders were closed, their activities could not continue. Traders of finished leather products (mostly women) were also particularly affected by movement restrictions during periods of national lockdown.[491]

Women's roles in the leather and leather products value chain

Data on employment in leather production is not available, however 40% of the 200,000 manufacturing workers are women. Women are more likely to be self-employed than employees, while men are more likely to be employees; in total, 65% of

487. National Industrial Research and Development Agency (NIRDA). (2017)
488. Business Daily (2022)
489. National Institute of Statistics of Rwanda (NISR) 2021c
490. National Institute of Statistics of Rwanda (NISR) 2021c
491. Pathways Study Interview with Sector Stakeholder

women are own account workers (compared to 41.5% of men), 28% are employees or paid apprentices/interns (compared to 55% of men). More women than men are unpaid family workers (about 4,500 women, or 5.5% of female workers, compared to 1,600 men or 1.5% of male workers). Only 22% of employers were women. No women workers were classified as members of cooperatives.[492]

> "Over 70% of women in the leather sector are involved in trading finished leather products, which is often done in informal markets."
>
> Source: Pathways Study Interview with Sector Stakeholder

Fieldwork findings for the Pathways Study confirmed that there is a significant gender participation gap across all the stages of the leather value chain, except for the last stage: the trading of finished leather products. From street vendors to small shops, women informally sell leather shoes, belts, bags and other leather products within and on the outskirts of major cities. Working informally, however, leaves women without any protection from labour laws or social benefits, such as a pension, health insurance or paid sick leave. In some urban areas, the women traders work in unsafe areas and conditions that potentially expose them to risks, including sexual harassment.[493]

Male-headed households are more likely to own cattle and sheep, while female-headed households are more likely to own goats. Overall, around 60% of households own some type of livestock (57.3% of female-headed households, and 60.3% of male-headed households).[494] In total, 53.3% and 40.8% of male- and female-headed households, respectively, own cattle, while 49.8% and 56.4% of male- and female-headed households, respectively, own goats. In total, 14.4% of male- headed households and 12.4% of female-headed households own sheep.[495]

Literature on livestock farming, in relation to producing raw materials for leather products, is limited.[496] An example from the Eastern Province, however, suggests that women may not participate in exports of hides and skins. Only four exporters existed in the region as of 2014, and all were men.[497]

> "Women contribute to the sector but also face some social and cultural barriers that prevent them from being involved in some areas of the value chain.
>
> As a matter of fact, it is culturally unusual/ inappropriate to see a woman being involved in slaughtering cows."
>
> Source: Pathways Study Interview with Sector Stakeholder

492. National Institute of Statistics of Rwanda (NISR) 2021c
493. Pathways Study Interview with Female Vendor in Nyamirambo Area, Kigali city
494. EICV5 (2018:9) in Green Climate Fund (GCF). (2021)
495. NISR, EICV 2014-2015 in Green Climate Fund (GCF). (2021)
496. Shapiro, B. I., Gebru, G., Desta, S., & Nigussie, K. (2020)
497. NAEB, 2014 in Green Climate Fund (GCF). (2021)

Summary of barriers to and opportunities for women's economic empowerment in the leather and leather products value chain

Barriers

Structural	Normative	Individual
Customary laws restricting women's land ownership	Women have limited control over sales and income from livestock secondary products including leather	Women have limited access to finance
Limited regulation of informal sector	Gender norms limit women's roles in the sector	
No guaranteed minimum wage provisions	Unpaid care and domestic labour	

Opportunities and entry points

Structural	Normative	Individual
Legal provisions including those prohibiting sexual harassment	GBV prevention and response	Technical and vocational education and training (TVET) helps women acquire technical skills
Implementation and monitoring of labour law and minimum guaranteed wage provisions		
Gender and family promotion commitments in NST1		
Business Development Fund		

Structural factors

Labour rights and working conditions in the formal sector are determined by existing labour regulations. These include Law No. 13/2009 of 27 May 2009, which mandates rights such as contracts, wages, safety, trade unions, etc., as well as rights specific to support women, including non-discrimination, considerations to protect pregnant and lactating women, and maternity leave.[498] Other relevant legal instruments are Article 168 of the Rwandan Constitution, international and regional instruments ratified by Rwanda on labour rights and working conditions for women workers.[499]

Legal provisions do not regulate the informal sector, with some exceptions. As per the labour law (Article 1), only health and safety, social security and trade unions apply to the informal sector. For work carried out as part of family activities (Article 3), only prohibitions of child labour and of specific work for pregnant women apply.[500]

The national minimum wage set in 1974 of RWF100 (around USD0.09) per day still applies today.[501] Although a minimum guaranteed wage (MGW) is mentioned in Article 76 of the new labour law, this has not been implemented. The article states that the MGW per category of work is to be determined by an Order of the Minister in charge of labour after collective consultations. This order has not yet been enacted.[502]

Women workers are protected against sexual harassment. This is indicated in Article 203 of the Rwandan penal code, which includes provisions for prison sentences and fines for offenders.[503]

> "Some women still need the approval of their husbands before they apply for loans, even loans where collateral is not needed.
>
> More than 80% of women from cooperatives and companies don't apply for any loans from financial institutions."
>
> Source: Pathways Study Interview with Sector Stakeholder

Normative factors

Gendered division of labour impacts on the roles women undertake in the sector. Due to patriarchal household norms, women also have limited control over sales and income for both livestock secondary products including leather.[504]

Other normative factors likely to affect women's economic opportunities within the sector include the "double burden" of unpaid care and domestic work, and gender-based violence, although data specific to how these normative factors play out in the leather and leather products sector is limited.

498. Tite, N. (2018) 499. Tite, N. (2018) 500. Tite, N. (2018) 501. AgriLogic (2018) 502. Tite, N. (2018)
503. Organic Law No. 01/2012/OL of 2 May 2012 instituting the penal code, Official Gazette nº Special of 14 June 2012 in Tite, N. (2018)
504. Green Climate Fund (GCF). (2021)

"From my experience of working with cooperatives, Rwandan women doubt their financial capabilities.
Women should know and believe the reality that they are equally good if not better at making sensible money decisions than men. Just like financial independence is paramount, confidence to manage one's own money is important too."
Source: Pathways Study Interview with Sector Stakeholder

Individual factors

Women are gaining skills related to the sector through technical and vocational education and training (TVET). In 2018, almost half (44.9%) of students attending trade and technical training on leather crafting were women. Women comprised just over a third (38.1%) of students in livestock management training.[505]

Women's limited access to finance affects their ability to establish small businesses. Half of the interviewed cooperatives and companies in the leather and leather products sector highlighted that they started their enterprises with family money and personal savings. The government tries to support access to finance through the Business Development Fund, which provides a portion of the required collateral for loans but applying entails a long and complicated process.[506]

"In the leather sector, stakeholders are grouped mostly in cooperatives and some, in companies. They are from different social groups, we even contacted a cooperative of disabled people in Karongi district. All the stakeholders have built a strong social network, and this has generated good fruits."
Source: Pathways Study Interview with Sector Stakeholder

Recommendations

1. **Support the leather and leather products sector to grow sustainably to improve the long-term economic opportunities available to women.**

Rwanda's leather and leather products sector experiences multiple challenges that are not gender-specific (e.g. importation of raw materials that should ideally be produced locally). This needs to be addressed in gender-sensitive ways for women to sustainably benefit from participating in the sector. Strategies can include:

505. National Institute of Statistics of Rwanda (NISR) (2018), in UNIDO (2020)
506. Pathways Study Interviews with Sector Stakeholders

- Improving and simplifying the availability of credit for women, with tailored finance for the leather sector (which requires longer-term loans).
- Quality control needs to be instituted throughout the value chain, with opportunities to meaningfully engage women at every stage optimised. The Rwanda Standards Board (RSB) and MINAGRI can play a central role in this.
- In addition, secondary opportunities exist to better utilise all materials from the cattle to create products for sale. MINAGRI can support producer women's cooperatives to explore how by-products such as hooves, horns, blood, bones, offal and trimmings can be utilised for producing items such as poultry feed, fertilisers, compost and soil improvers, glue, decorations, furniture and fittings, among other products.
- The government should further facilitate increased investment in the leather sector by implementing policies that are conducive for investment, such as tax holidays, while ensuring high social and environmental standards are adhered to and strengthened including waste and chemical management.
- Pioneer and promote a sustainable and ethical leather industry ensuring that women in the value chain retain the profits from their labour through collective bargaining and women's cooperative membership.

2. Ensure strong sectoral commitment to gender equality as the sector grows.

Recommended strategies include:

- Support women's leadership in the sector as it grows. Implement initiatives to support women in supervisory and management roles in key sector players (government regulators, buyers, etc.).
- Advocate with government for improved gender-responsive policies in the sector, including upholding women's labour rights and health and safety in tanneries
- Work with government to improve implementation of policies and laws in relation to labour rights and decent work, and advocate for ratification of the ILO Violence and Harassment Convention (No. 190).
- Support the implementation and monitoring of gender commitments of value chain actors, particularly working with international buyers and improving due diligence requirements and processes.
- Support implementation and improvement of social security mechanisms for tannery workers.
- Work with communities to promote opportunities for women in the leather and leather products value chain through behaviour-change education and promotion of female role models.

3. Work with employers to promote gender-sensitive and safe workplaces (tanneries).

Recommended strategies include:

- Ensure new and existing tanneries endorse and implement gender commitments, which should include gender-sensitive policies, staff training, the setting up of anonymous grievance mechanisms, and the establishment of gender, health and safety, and welfare committees.
- Focus on addressing sexual harassment in the sector, promoting zero tolerance, as well as promoting job security and stability.
- Advocate for living wages for tannery workers.
- Ensure that health and safety processes are in place, and that there is a focus on ensuring awareness of safe practices among workers.
- Facilitate setting up and joining of trade unions and other collective actors, build their capacity on gender, and negotiate roles at tannery level. Ensure workers are aware of labour rights and that women are represented in collective actors.
- Create facilities for day care and support mothers returning to work. Provide facilities or support to address sexual and reproductive health needs. Provide WASH (water, sanitation and hygiene) facilities.
- Implement initiatives to support women in supervisory and management roles in new and existing tanneries.
- Implement initiatives to increase interest in hiring women in non-traditional roles and sectors, including initiatives focused on showcasing women role models and on creation of mentorship opportunities.

4. Support women entrepreneurs and self-employed women working in leather processing (tanning) or final products manufacturing.

Recommended strategies include:

- Promote initiatives improving skills on leather production, in quality hide tanning for local use or export.
- Support household-level interventions which tackle inequitable norms, attitudes and behaviours hindering women's economic opportunities and wellbeing.
- Promote initiatives that address limited ownership and control over productive assets, including access to credit and finance.
- Implement initiatives to increase interest of women in non-traditional sectors, including initiatives focused on showcasing women role models and on creation of mentorship opportunities.

- Support women to organise in retail and trade cooperatives, to support better price setting, market opportunities and linkages, and access to training (including on business skills training, financial management, and leadership). Support cooperatives in establishing links to international markets, and to showcase sustainable production.

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

Recommended strategies include:

- Leverage and invest in TVET programmes and organisations targeting women.
- Support holistic and rights-based initiatives that combine skills training with efforts to improve financial literacy and access to sexual and reproductive health services.
- Focus on skills on quality tanning, and finished leather production.
- Support initiatives that link skilled candidates to job opportunities, drive initiatives' success by providing incentives such as "payment for results" and monitoring of gender targets and number of people obtaining jobs.
- Support scholarships or paid apprenticeships for women, or other forms of on-the-job training.
- Support business skills programmes for women entrepreneurs and collectives.
- Provide financing to support time-saving technologies, livestock ownership and production of leather therefrom, and livestock-specific credit schemes.

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

Recommended strategies include:

- Commission and undertake research to better understand opportunities and barriers for women livestock owners to benefit from the growing leather sector.
- Evaluate interventions and include outcomes and indicators related to women's economic empowerment as well as related outcomes linked to experience of gender-based violence and sexual and reproductive health to provide an accurate picture of the impact on any intervention on women's lives.
- Ensure meaningful participation of women in the design of all interventions, including through participatory methods.

Source: Feed the Future. Photo by Sam Phelps/ Catholic Relief Services

6. Implications and recommendations

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

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

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

The findings highlight significant opportunities to enhance Rwandan women's economic empowerment and potential. A coordinated, multi-pronged and multi-stakeholder approach must be adopted to address and tackle barriers identified at each level. At the same time, it is critical to recognise what is working within the country, namely programmes with potential for scale and high levels of impact. The following proposed recommendations and considerations have been articulated recognising the challenges experienced and successes achieved by the county in strengthening WEE outcomes. It involves engaging policymakers, programmers and research - including ones directly working on WEE-focused programmes and initiatives, as well as ones involved in broader/synergistic economic development programming, which directly or indirectly impact WEE outcomes.

These proposed recommendations can serve as a starting point for further deliberations by multiple stakeholders including government to ensure actionable interventions within mutually agreed timeframes.

6.1 Policy/Advocacy recommendations

Address key policy gaps and improve implementation and monitoring of key policies and programmes around women's land ownership, girls' education and gender-based violence.

Recommended strategies include:

- Support community-based monitoring of gender-responsive budgeting in education, health, agriculture and infrastructure.

- Support implementation and monitoring of gender and family promotion commitments in the NST1.
- Review of the existing labour laws to extend important protective elements secured by formal workers to informal workers. It should contain special provisions relating to temporary or casual workers that allow them to benefit from the provisions of collective agreements.
- Strengthen implementation of policies, accountability and remediation mechanisms on equal land ownership, sexual harassment, gender-based violence and child marriage at the district level.
- Strengthen national programmes such as the Vision 2020 Umurenge Programme, impact on women's economic empowerment, drawing on results of external evaluations, and ensuring they address normative barriers while also being based on market needs.
- Advocate for the government to ratify the ILO convention (No. 190) on Violence and Harassment.
- Address gender discrimination through legislation including access to credit, equal pay, as well as women's rights within marriage.
- Advocate for greater public investments and incentives to keep girls in school and encourage more engagement in science and technical subjects.

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

Recommended strategies include:

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

- Community-based sensitisation on women's rights, what constitutes child marriage and issues such as gender-based violence (including economic violence), available reporting mechanisms and services outlining obligations of service providers, and where complaints (including regarding poor treatment, bribes or corruption) can be lodged.
- Identify role models to act as champions for behaviour change towards gender equality within communities.
- Introduce strong digitisation efforts that are women orientated and women focused.

Advocate to remove gender-based barriers to finance and promote women-friendly financial services.

Recommended strategies include:

- Meaningfully engage women in the design of financial services and products (including mobile money products), to ensure that they are accessible for all women including those most marginalised (young women, women with disabilities, rural and illiterate small holders, etc.).
- Introduce legal and regulatory frameworks that enable women to access credit and criminalise discriminatory practices.
- Government to consider incentives for financial institutions with prioritised gender approaches to financial services and products.
- Agricultural funding programmes for the youth with gender mainstreaming as a key objective. This will foster changed mindsets as communities evolve.

6.2 Programming recommendations

All programming should be based on a robust gender analysis which identifies risks and mitigating measures at each level of the change pathway. This is an essential part of good programming for all types of programmes, including those which may not have gender or women's economic empowerment as a core area of focus.

Programmes should also adopt gender transformative approaches/models that foster women's active engagement with and influence of gender norms within their communities. Such approaches should support women navigating their way into positions of influence that enable them address imbalances between men and women in their communities.

Assess and address women's and girls' unpaid care and domestic work burden so that they can complete their education, acquire marketable skills, and work for pay outside the household.

Recommended strategies include:

- Carefully assess the extent to which project activities could increase women's workload, and actively incorporate time- and labour-saving interventions targeted at women

.

- Facilitate women group leaders to receive training (leveraging the training of trainers model - ToT), to provide training at grassroots levels in smaller groups, for all to access with minimal disruption.
- Work with the private and public sectors to ensure that households have access to energy, water, hygiene and sanitation facilities to reduce women's and girls' drudgery and time poverty.

Strengthen cooperative businesses to provide opportunities for women members to participate in cooperative leadership and governance to enable women's collectives to build social, human and economic capital, and tackle normative barriers.

Recommended strategies include:

- Develop robust frameworks around women's VLSAs to create new, and strengthen existing, groups.
- Support the formation of new women-led cooperatives.
- Facilitate existing collectives to register as legal entities, for improved access to collective services.
- Build the capacity of micro-lending institutions to provide services to women-led cooperatives.
- Ensuring that all work to support agricultural value chains includes a focus on supporting women to invest in storage facilities, aggregation centres, reach more lucrative markets, quality control and receive better prices for their goods.
- Developing built-in disaster and climate-resilient strategies that are adopted and integrated into women's collectivisation.
- Ensure equitable access to productive resources and extension services (including through increasing access to digital solutions).

Work with women and girls holistically to improve their human capital and wellbeing.

Recommended strategies include:

- Ensure education to employment pathways for adolescent girls and young women are clearly determined - moving from secondary education towards accessing higher/tertiary education opportunities.
- Leverage and strengthen TVET efforts to improve targeting of women, ensure gender-sensitive activities, and that skills training is based on an assessment of market opportunities.
- Address barriers to girls' education and factors influencing school dropout at higher levels of education.
- Include efforts to improve soft skills around leadership, negotiation and conflict management.
- Targeted interventions to improve women's voice, decision making and self-efficacy; more equitable norms

around leadership and land rights; and opportunities for women to move into new or upgraded roles.
- Work with partners to increase women's access to digital technologies through digital skills training and promotion of platforms such as the "Buy from Women" digital platform[507] - which provides easier access to information, finance and markets to women farmers.
- Introduce livelihood diversification opportunities for women.
- Include efforts to improve business capabilities, including digital skills.
- Focused interventions to move women up value chains and into more lucrative/ productive sectors.
- Include focus on building capacity to improve resilience to future economic shocks, and ongoing training.
- Ensure girls and women have access to SRHR services, information and products.

Work with large employers to promote gender-sensitive and safe workplaces.
Recommended interventions include:
- Strengthen organisational internal gender capacity to improve gender-related knowledge, attitudes, skills of staff, and enhance institutional policies and practices.
- Workplace empowerment programmes that improve women's health knowledge and access to goods and services, e.g. SRHR literacy, access to affordable contraception and menstrual health products, as well as financial literacy, and training addressing both hard and soft skills.
- Improve working conditions and health and safety for women workers.
  - Digitised wage systems through financial wallets to enable women to receive and control income safely.
  - Provision of a living wage, flexible working hours and good parental leave policies.
  - Addressing the gender pay gap.
  - Provision of on-site childcare.
  - Loans for access to piped water or off-grid energy solutions.
- Policies to proactively procure from women suppliers and women-owned businesses.
  - Ensure anti-sexual harassment policy that explicitly condemns sexual harassment and gender-based violence in the workplace and at home.
  - Implement confidential grievance and complaints procedures that women workers feel confident to use.
  - Training managers and supervisors to raise awareness of the harmful effects of violence and harassment and how to prevent it.
- Working directly with male employees and management to shift attitudes and behaviours related to violence against women and girls.

507. UN Women (2017)

Implement and scale up evidence-based livelihood and economic empowerment models (such as the Indashyikirwa programme[508]) with small holder farmers.
Recommended strategies include:

- VSLA initiatives coupled with gender-transformative interventions at the household level which increase women's access to and control over economic assets and access to financial services, promote their financial independence, reduce their vulnerability to economic and other forms of gender-based violence, and support women's ability to seek services, including legal help, if required.
- Engagement with opinion leaders to advocate for greater gender equality in local communities.
- Household dialogues or other behaviour-change interventions that address income negotiation, support women's involvement in decision making around how to spend coffee and tea income and encourage men's increased use of income to support household expenditure (such as children's welfare).
- Initiatives which address gender-inequitable attitudes and norms including around gender roles in the value chain and women's mobility within household interventions.
- Initiatives which address drivers of economic violence including land and asset dispossession and strengthen GBV response services.

Strengthen private sector engagement.
Recommended strategies include:

- Incentivise organisations to develop innovative technological and digital approaches that reduce women's burden/drudgery.
- Strengthen organisational internal gender capacity to improve gender-related knowledge, attitudes, skills of staff and enhance institutional policies and practices.
- Raise awareness of women's current and potential contribution to value chains, encouraging recognition and reward of women's labour ensuring that women's positions in the supply chain are made more formal and visible to key actors.
- Establish a mandate for representation of women in leadership positions within private/public sector enterprises.
- Raise awareness and accountability towards relevant employment law and women employees' rights - including tackling the gender pay gap and workplace-based gender discrimination.
- Focus on women's workplace conditions - including policies and facilities to be safe, equitable, and more favourable for women.
- Advocate for gender-positive and inclusive policies and systematic frameworks among SMEs.

508. The Prevention Collaborative. (2019)

6.3 Research, monitoring and evaluation recommendations

Commission and undertake research to address research gaps including:

- Studies to understand the dynamics of economic violence such as asset and land dispossession in Rwanda, as well as what works to prevent and respond to these forms of gender-based violence.
- Research to understand barriers faced by the most marginalised groups of women including women with disabilities, migrants and refugee women.
- Research on the social capital benefits of membership in cooperatives for women, disaggregated by household type (e.g. female headed, etc.).
- Studies to understand the effectiveness of current government interventions such as NST1, along with the status of implementation/adoption of supportive labour rights proclamations.
- Commission evaluations of social protection programmes, and their intended impact on women.
- Execute planned research and survey efforts to draw clear and meaningful insights on women's time use and unpaid domestic and care work.

Include measures of key factors enabling or constraining women's economic empowerment including gender-specific measures focused on women's capabilities and agency, household relations and gender norms and attitudes. This should also include tracking signs of potential backlash including increased rates of intimate partner violence.

At a minimum, disaggregate results by sex and include sex-disaggregated targets. Wherever possible, programmes and research should further disaggregate by other socioeconomic characteristics including income, age, race, disability, migratory status and geographic location.

Commission mixed-method research and evaluations on these issues to understand how and why change happens, and to better understand women's lived realities through participatory qualitative research, and theory-based evaluations.

Monitor, track and mitigate against any signs of potential backlash during programme implementation, including increased rates of violence against women.

Appendices

Appendix 1 - Explanation of methodology

Scoping study

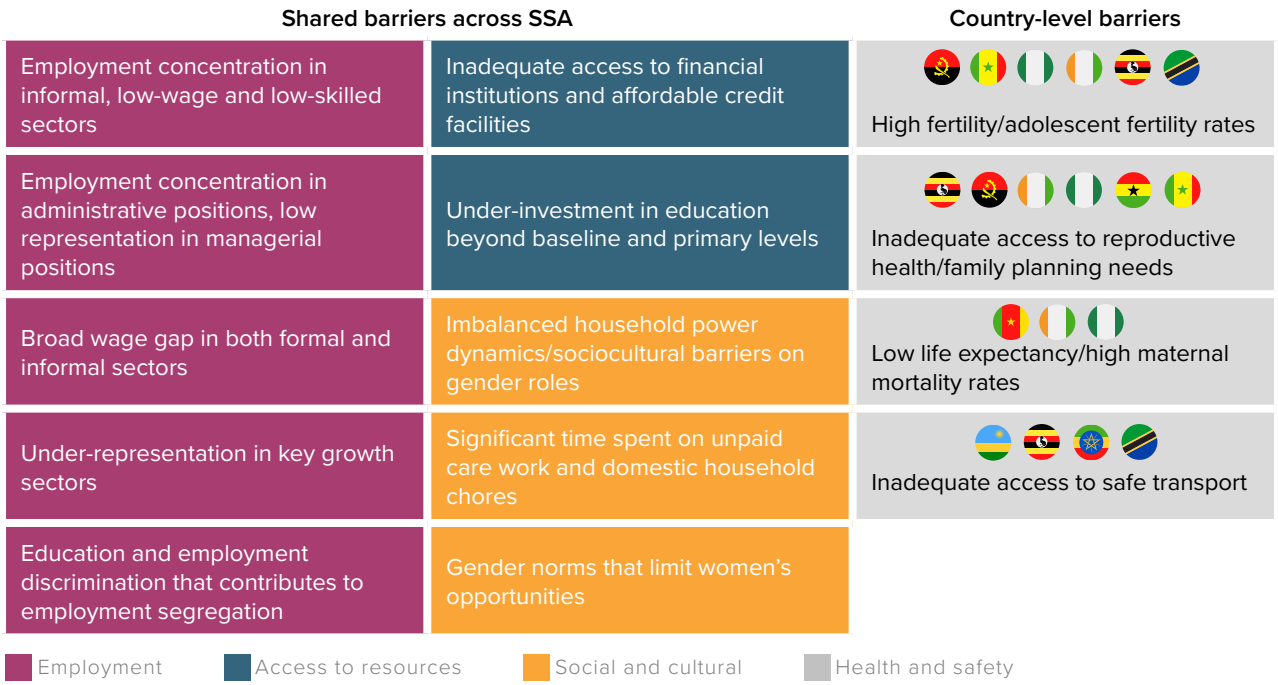
A scoping study was implemented to guide research fundamentals

Euromonitor International undertook preliminary research to analyse the existing literature on women's economic empowerment in the 13 countries, identify research and data gaps to help develop research objectives/ questions and guide the methodology design of the Pathways Study.

Multiple drivers and barriers to women's economic empowerment exist, and the initial scoping research helped identify key commonalities as well as underlying differences across sectors and countries. In agriculture, the role of women within local governance and resource control/distribution structures is critical to success, and cooperatives/collectives have been effective at increasing women's economic outcomes and agency. In non-agriculture sectors, employment segregation and unpaid care work, both usually driven by gender norms, are key barriers relegating women to certain roles and/or restraining women from certain sectors and/or to lower-paying positions/occupations within sectors.

Additionally, while national institutions are often tasked with addressing women's economic empowerment broadly, local entities and sector-specific organisations are better placed to implement meaningful changes/localised solutions that expand women's economic opportunities in a sustainable way.

Sample findings from scoping study



Note: Countries listed under the 'country-level barriers' reflect SSA countries (within the scope of the Pathways Study) that experience the highest levels of the listed WEE health-related barriers. These include:
- High fertility/adolescent fertility rates: Angola, Cote d'Ivoire, Nigeria, Senegal, Tanzania & Uganda
- Inadequate access to reproductive health/family planning needs: Angola, Cote d'Ivoire, Ghana, Nigeria, Senegal & Uganda
- Low life expectancy/high maternal mortality rates: Cameroon, Cote d'Ivoire & Nigeria
- Inadequate access to safe transport: Ethiopia, Rwanda, Tanzania & Uganda

Sector selection

In executing the first key objective of the Pathways Study research programme ("identifying sectors with the most potential to contribute to and benefit from expanding women's opportunities"), Euromonitor International considered the level of these opportunities, both in terms of potential/scope (reaching the majority of women across the country) and in terms of feasibility (ease with which to expand opportunities). Quantitative and qualitative methods were utilised to ensure a balanced perspective on the sector selection.

Focusing on priority sectors, using economic modelling to tease out the data/ quantitative story for women's economic empowerment

The United Nation's globally recognised International Standard Industrial Classification of Economic Activities (ISIC Rev. 4) [509] was utilised for the definition of sectors. In order to ensure full alignment with other data sources (including Euromonitor International's Passport database from which other data was sourced), the ISIC's 21 categories/sectors were consolidated into 14 overall sectors (please refer to Appendix 2 for full definitions). Euromonitor International's Analytics team analysed historic and current data available at a country level on the main economic sectors. The team developed forecasts for productivity, employment and women's economic potential in each economic sector. This modelling used variables including Gross Value Added (GVA) at sector level, Gross Domestic Product (GDP), Employment Data, Capital Data, Demographics Data, sourced from Passport (Euromonitor International's proprietary database). The analysis also incorporated data from the International Labour Organization statistical database (ILOSTAT[510]): (i) Employment data by sex and economic activity; and (ii) Mean weekly hours worked per person by sex and economic activity. The African Development Bank Group (AfDB) database [511] provided additional input on: (i) GVA from Education, Human Health and Social Work Activities - for Angola, Botswana and South Africa; and (ii) Gross Capital Formation per public/private sector. These metrics were utilised in a model to predict the GVA share from GDP using fixed effect panel data regression. The metrics were also used in another model to assess the benefit of women's inclusion per sector (using a Cobb-Douglas production function with labour disaggregated by gender [512]).

Euromonitor International then developed these findings into a visual scorecard that ranks sectors based on three scenarios: (i) sector performance; (ii) labour opportunity and productivity; and (iii) gender labour gap.

509. See https://unstats.un.org/unsd/publication/seriesm/seriesm_4rev4e.pdf
510. https://ilostat.ilo.org/ 511. https://dataportal.opendataforafrica.org/
512. The methodology was adjusted based on earlier work by Espinoza, Raphael and Ostry, Jonathan D., & Papageorgiou, Chris, The Armistice of the Sexes: Gender Complementarities in the Production Function (June 2019). CEPR Discussion Paper No. DP13792, Available at SSRN: https://ssrn.com/abstract=3428312

Scorecard scenarios for ranking economic sectors

Scenario 1:

Women's opportunities rest mainly on the sectors' performance: Women will benefit from huge increase of GVA in the most dominant sectors.

Rank	Sectors
1	**Agriculture, Forestry And Fishing**
2	**Real Estate Business And Administrative Activities**
3	**Construction**
4	Transport Storage And Communication
5	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles
6	Financial And Insurance Activities
7	Education
8	Other Services
9	Public Administration And Defence; Compulsory Social Security
10	Manufacturing
11	Utilities
12	Accommodation And Food Service Activities
13	Mining And Quarrying
14	Human Health And Social Work Activities

Scenario 2:

Women's opportunities rest mainly on labour performances: Women will benefit from huge increase of labour force and sector productivity.

Rank	Sectors
1	**Agriculture, Forestry And Fishing**
2	**Financial And Insurance Activities**
3	**Real Estate Business And Administrative Activities**
4	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles
5	Construction
6	Transport Storage And Communication
7	Other Services
8	Public Administration And Defence; Compulsory Social Security
9	Education
10	Manufacturing
11	Utilities
12	Accommodation And Food Service Activities
13	Mining And Quarrying
14	Human Health And Social Work Activities

Scenario 3:

Women's opportunities rest mainly on the current gender gap: Women can win in sectors where gender gap is high and sectors will highly benefit from female inclusion.

Rank	Sectors
1	**Transport Storage And Communication**
2	**Agriculture, Forestry And Fishing**
3	**Real Estate Business And Administrative Activities**
4	Other Services
5	Construction
6	Financial And Insurance Activities
7	Manufacturing
8	Utilities
9	Wholesale And Retail Trade; Repair of Motor Vehicles And Motorcycles
10	Public Administration And Defence; Compulsory Social Security
11	Education
12	Accommodation And Food Service Activities
13	Mining And Quarrying
14	Human Health And Social Work Activities

The scorecard was shared with country working group participants through workshop sessions to ensure that sector selections reflected inputs from country-level stakeholders

To ensure a balanced approach to choosing the sectors of focus, Euromonitor International organised "sector selection" workshops per country to discuss the findings from the scoping study and scorecard.[513]

Leveraging Steering Committee and partner networks, participants/stakeholders from the private and public sectors of the country were invited to share their feedback on the scorecard sectors and to provide input on sectors/sub-sectors of focus. Country stakeholders' knowledge and experience were incorporated to ensure that the selection of the sectors was contextually cognisant, while considering the informal economy and the socioeconomic, political

513. These "sector selection" workshops for the Pathways Study occurred between December 2020 and February 2021.

and cultural factors that are likely to drive women's opportunities. Noteworthy is that country working group participants were aligned with the scorecard ranking of agriculture as a priority (especially export-orientated commodities). They also flagged the importance of manufacturing as a sector with potential for gender-inclusive economic development.

Euromonitor International then conducted additional secondary research to validate the sectors proposed during the workshop in order to develop a matrix of criteria and considerations (see below) to support the final selection of two broad sectors in Rwanda: (i) Agriculture covering three sub-sectors - Coffee/Tea, Green (French) Beans and Fishing/Aquaculture - the latter via a short piece/spotlight approach); and (ii) Leather and Leather Products.

Selection Criteria Deep Dive: Rwanda

Broad Economic Sector	Specific Sectors/ Commodities (if applicable)	Criteria fulfilled (checklist)						Criteria fulfilled (explanation)	Considerations met & Explanation	Potential Challenges (conducting research in sector + sector-specific)
		1	2	3	4	5	6			
Agriculture	**Green (French) Beans**	✓	✓	✓	✓	✓	✓	Young women engage in a farming (subsistence and commercial).	Export priority. Young women involved: Rural + Urban interplay.	Poor irrigation.
	Coffee/Tea	✓	✓	✓	✓	✓	✓	Interest area for Rwanda National Strategy for Transformation (2017 – 2024)		Climate change, bad roads, poor input (seed) supply.
	Fishing and Aquaculture	✓	✓	✓	✓	✓	✓	Women expressed agency by venturing into male-dominated stage of fishing (i.e., going beyond trade).	Young women involved: Rural + Urban interplay.	Poor fishing, technology/ equipment, Male-domination.
Leather and leather products	**Raw hides & skins**	✓	✓	✓	✓	✓		Informal. Immediate opportunity.	Export commodity. Young women involved: Rural + Urban interplay.	Low value commodity.
	Leather goods e.g., handbags, belts	✓	✓	✓	✓	✓		Informal (artisanal in nature) with co-ops. Immediate opportunity.		Low adoption/use of technology.

Criteria

1. Incorporating informal economy	2. Ability to effect change	3. Women's preferences & agency	4. Alignment with govt strategy/national devpt plan	5. Timescale of intended impact + sector potential	6. Scorecard priority

Stakeholder mapping

The research team identified key WEE stakeholders in relevant sectors mainly via desk research and supplemented with interviews. The research team then mapped these stakeholders per location (province) in the country

The research team (Euromonitor International and country research partners) used desk research and targeted outreach and interviews to identify and map key stakeholders playing a key role in women's economic empowerment within each sector. The objective of this mapping was twofold: (i) to identify key stakeholders - public and private per sector in each country, their operations within the supply/value chain, key projects/initiatives, any key provisions for women (e.g. membership, leadership, gender-focused programmes, etc.) and their impact on women's economic empowerment; and (ii) to identify potential stakeholders to be interviewed for the Pathways Study.

This mapping produced some 199 stakeholders in Rwanda across the two broad sectors: (i) Agriculture covering three sub-sectors - Coffee/Tea, Green (French) Beans and Fishing/Aquaculture; and (ii) Leather and Leather Products. These stakeholders included: (i) sectoral structures (associations, cooperatives and collectives, organisations and representative bodies); (ii) government ministries, departments and agencies; (iii) private companies; and (iv) non-governmental organisations - NGOs (international and country). Please refer to the Pathways Study website for the full mapping of stakeholders.[514]

	Interviewee Type				
Sector/Sub-Sector	**Private Companies**	**Farmers' Unions/ Federations**	**Cooperatives/ Collectives**	**Government Bodies**	**International NGOs**
Agriculture (Tea)	2	4	1	-	4
Agriculture (Coffee)	3	1	1	1	
Agriculture (Green (French) Beans)	2	-	3	1	
Agriculture (Fishing/ Aquaculture)		2	4	1	
Leather and Leather Products	3	-	10	-	-
Total	**10**	**7**	**19**	**3**	**4**

[514] Stakeholder listing is based on secondary research and interviews, so all stakeholders (especially those with highly localised and/or offline operations) may not have been captured in the listing. All maps and tables present best-available information and can be updated as new information is received.

Interviews

The research team conducted interviews with key stakeholders to dive into women's roles per sector, including the drivers and challenges faced and future opportunities

The research team for Rwanda conducted a total of 43 in-depth interviews with stakeholders including cooperatives/collectives, farmers' unions/federations, INGOs, private companies and public entities. The objective was to discuss women's participation in the sectors/sub-sectors in Rwanda, the key drivers/barriers to expanding women's opportunities, and the actionable steps to getting there. The questions were structured into three broad themes/objectives (examples of broad topics discussed per theme below):

1. **Sector/Sub-sector overview and trends**
- What are the sector's drivers and constraints - generally and for women specifically?
- How does the sector provide opportunities for achieving sustainable employment and/or sustainable livelihoods?

2. **Current status of women in sector/sub-sector**
- What types of positions/jobs do women hold (formal and informal)? Why?
- What are the drivers of and barriers to women's (increased) economic participation in the sector/sub-sector (employment, entrepreneurship, career advancement, etc.)?

3. **Future opportunities for women in the sector/sub-sector and actionable solutions**
- What type of roles/positions/jobs/opportunities (including self-employment) can women target? How? What is needed to support them?
- What are the current solutions being implemented?
- Are there any other solutions not yet being implemented that may improve women's economic participation in the sector?
- Who are specific key stakeholders crucial to implementing identified solutions?

Analysis and reporting

Findings from primary and secondary sources were analysed and developed into a report (including actionable recommendations) which was reviewed by multiple stakeholders/partners

The research team then analysed data and insights collected from secondary and primary research to produce key findings and proposals to improve women's economic opportunities. Key drivers and barriers plus preliminary recommendations were then developed for discussion/elaboration with country working group participants in a

"developing recommendations" workshop facilitated by Euromonitor International.[515] This was in order to integrate their expertise and knowledge of the country's context into the analysis and to ensure the final recommendations are tailored, relevant and feasible for women in the country.

Feedback from country working group participants was then incorporated ahead of sharing the draft reports with key stakeholders (sector experts, thematic experts, Pathways Study Steering Committee) for validation, and working with Kore Global for finalisation.

Appendix 2 - Sector classification

Overall sectors Based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
1	Accommodation and Food Service Activities	This category corresponds to Section I of the International Standard Industrial Classification (ISIC Rev. 4) and comprises units providing customers with short-term lodging and/or preparing meals, snacks and beverages for immediate consumption. The section includes both accommodation and food services because the two activities are often combined at the same unit.
2	Agriculture, Forestry and Fishing	This category corresponds to Section A of the International Standard Industrial Classification (ISIC Rev. 4) and covers the exploitation of vegetal, animal and fish natural resources. The section comprises the activities of growing crops, raising animals, harvesting timber, and harvesting other plants and animals from a farm or their natural habitats. Fishing is defined as the use of fishery resources from marine or freshwater environments, with the goal of capturing or gathering fish, crustaceans, molluscs and other marine products (e.g. pearls, sponges, etc.).
3	Construction	This category corresponds to Section F of the International Standard Industrial Classification (ISIC Rev. 4) and includes general construction and special trade construction for buildings and civil engineering, building installation and building completion. It includes new work, repair, additions and alterations, the erection of prefabricated buildings or structures on the site and also construction of a temporary nature.

[515] These "developing recommendations" workshops for the Pathways Study occurred between March 2021 and June 2021.

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
4	Education	This category corresponds to Section P of the International Standard Industrial Classification (ISIC Rev. 4) and includes public as well as private education at any level or for any profession, oral or written as well as by radio and television or other means of communication. It includes education by the different institutions in the regular school system at its different levels as well as adult education, literacy programmes, etc. Also included are military schools and academies, prison schools, etc., at their respective levels.
5	Financial and Insurance Activities	This category corresponds to Section K of the International Standard Industrial Classification (ISIC Rev. 4) and comprises units primarily engaged in financial transactions, i.e. transactions involving the creation, liquidation or change of ownership of financial assets. Also included are insurance and pension funding and activities facilitating financial transactions. Units charged with monetary control, the monetary authorities, are included here.
6	Human Health and Social Work Activities	This category corresponds to Section Q of the International Standard Industrial Classification (ISIC Rev. 4) and includes the provision of health care by diagnosis and treatment and the provision of residential care for medical and social reasons, as well as the provision of social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and childcare to those requiring such assistance. Also included is the provision of veterinary services.
7	Manufacturing	This category corresponds to Section C of the International Standard Industrial Classification (ISIC Rev. 4) and includes: manufacture of food, beverages and tobacco; manufacture of textiles, wearing apparel and leather; manufacture of wood and wood products; manufacture of paper and paper products, printing and publishing; manufacture of chemicals and chemical petroleum, coal, rubber and plastic products; manufacture of non-metallic mineral products, except products of petroleum and coal; basic metal industries; manufacture of fabricated metal products; other manufacturing industries.

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
8	Mining and Quarrying	This category corresponds to Section B of the International Standard Industrial Classification (ISIC Rev. 4) and includes the extraction of minerals occurring naturally as solids (coal and ores), liquids (petroleum) or gases (natural gas). Extraction can be achieved by underground or surface mining or well operation.
9	Other Services	This category corresponds to Sections R, S, T and U of the International Standard Industrial Classification (ISIC Rev. 4) and includes services provided by businesses and government units to individuals, other businesses or the community as a whole, activities within households, where the same household is the consumer of the products produced.
10	Public Administration and Defence; Compulsory Social Security	This category corresponds to Section O of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities normally carried out by the public administration. However, the legal or institutional status is not, in itself, the determining factor. This division includes units that are part of local or central public bodies that enable the administration of the community to function properly. The section includes general administration (e.g. executive, legislative, financial administration, etc., at all levels of government) and supervision in the field of social and economic life; defence, justice, police, foreign affairs, etc.; management of compulsory social security schemes.
11	Real Estate Business and Administrative Activities	This category corresponds to Sections M, N and L of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities that focus mainly on the business sector with the obvious exception of real estate activities.

Overall sectors based on International Standard Industrial Classification of Economic Activities (ISIC Rev. 4)

#	Sector Name	Description
12	Transport Storage and Communication	This category corresponds to Sections H and J of the International Standard Industrial Classification (ISIC Rev. 4) and includes activities related to providing passenger or freight transport, whether scheduled or not, by rail, pipeline, road, water or air; supporting activities such as terminal and parking facilities, cargo handling, storage, etc.; postal activities and telecommunication; renting of transport equipment with driver or operator.
13	Utilities	This category corresponds to Sections D and E of the International Standard Industrial Classification (ISIC Rev. 4) and covers the activity of providing electric power, natural gas, steam supply, and water supply through a permanent infrastructure (network) of lines, mains and pipes.
14	Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	This category corresponds to Section G of the International Standard Industrial Classification (ISIC Rev. 4) and includes wholesale and retail sale (sale without transformation) of any type of goods and rendering services incidental to the sale of merchandise. Wholesaling and retailing are the final steps in the distribution of merchandise. Also included in this section are the repair of motor vehicles and the installation and repair of personal and household goods.

Appendix 3 - Cross-sectoral summary of barriers and opportunities and entry points

Structural Barriers	Coffee/ Tea	Green (French) Beans	Fishing and Aquaculture	Leather and Leather Products
Customary laws restricting women's land ownership	✓	✓	✓	✓
Limited labour law protection for informal workers	✓	✓	✓	✓
Lack of minimum wage provisions	✓	✓	✓	✓
Limited childcare provisions	✓	✓	✓	✓
Health and safety issues	✓	✓	✓	✓

Structural Opportunities and Entry Points	Coffee/ Tea	Green (French) Beans	Fishing and Aquaculture	Leather and Leather Products
Leadership quota in cooperatives	✓			
Implementation of minimum guaranteed wage	✓	✓	✓	✓
Enforcement of sexual harassment legislation	✓	✓	✓	✓
Provision of childcare facilities	✓	✓	✓	✓
Gender-responsive budgeting	✓	✓	✓	✓
Gender and family promotion commitments in NST1	✓	✓	✓	✓

Normative Barriers	Coffee/ Tea	Green (French) Beans	Fishing and Aquaculture	Leather and Leather Products
Patriarchal norms and women's lower social status compared to men	✓	✓	✓	✓
Gender norms restricting women's place in the value chain	✓	✓	✓	✓
Women's limited control over income	✓	✓	✓	✓
Employment gender segregation	✓	✓	✓	✓
Unpaid care and domestic work burden	✓	✓	✓	✓
Restrictions on mobility and limited access to markets	✓	✓	✓	✓
Gender-based violence (GBV) - including intimate partner violence and violence and harassment in the workplace	✓	✓	✓	✓

Normative Opportunities and Entry Points	Coffee/ Tea	Green (French) Beans	Fishing and Aquaculture	Leather and Leather Products
Working with communities to tackle gender inequalities	✓	✓	✓	✓
Promoting more gender-equitable intra-household decision making	✓	✓	✓	✓
Increasing women's access to markets through cooperatives	✓	✓	✓	✓
Presence of players who support women producers	✓			
Prevention and response to gender-based violence (including economic forms)	✓	✓	✓	✓
Interventions aimed at reducing women's unpaid care burden and redistribution of household care and domestic responsibilities	✓	✓	✓	✓

Individual Barriers	Coffee/ Tea	Green (French) Beans	Fishing and Aquaculture	Leather and Leather Products
Low ownership of land and limited access to land and durable assets	✓	✓	✓	✓
Limited storage facilities and low prices		✓		
Inadequate control over income	✓	✓	✓	✓
Limited access to and engagement in cooperatives	✓	✓	✓	✓
Limited access to extension workers, and few extension workers are women	✓	✓	✓	
Limited access to finance, credit and savings	✓	✓	✓	✓
Women's constrained educational outcomes compared to men	✓	✓	✓	✓

Individual Opportunities and Entry Points	Coffee/ Tea	Green (French) Beans	Fishing and Aquaculture	Leather and Leather Products
Working with cooperatives to expand opportunities to women	✓	✓	✓	✓
Improving women's access to extension services and training, while increasing female representation in the extension service sector	✓	✓	✓	
Improving digital skills and access to mobile money platforms	✓	✓	✓	✓
Holistic interventions which tackle women's education and skills, while building self-confidence and self-efficacy	✓	✓	✓	✓
Technical and vocational education and training (TVET)	✓	✓	✓	✓

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Limitations of Research

The Pathways Study is subject to the following research limitations, related to both the scope and timing of the study. The most important of these are captured below, but this list may not be exhaustive.

NOTE: Research design for the Pathways Study was completed in mid-2020, ground-level econometric data forecasting was completed in late 2020, fieldwork was carried out over January to June 2021 and the reports were prepared from then into 2022.

Evolving Topics/Input – General Factors and External Events

- Country policies are live guidelines which are periodically updated. The Pathways Study focuses on policy provisions and/or omissions for women's economic empowerment (WEE); its core focus has not been on analysing policies (e.g., the learnings, adjustments, and impact over time). Rather, the gendered linkages are the key focus of the Pathways Study.
- A qualitative inquiry about the impact of the COVID-19 pandemic on women's economic empowerment across sectors was incorporated into fieldwork and reports. However, given the research timing, at the beginning of and during the pandemic, new insights on its impact continue to emerge and could not be fully captured.
- The Pathways study recognises the importance of climate change, with broad impact that varies by sector, commodity, and gender, amongst other factors. While this did not form the focus of this study, the research explores its broad effects on the economy and (women in) agriculture and proposes relevant recommendations (e.g., climate-smart interventions) while also recognising recent country measures to integrate gender into the climate change agenda.
- Similarly, the ongoing conflict between Russia and Ukraine has impacted various sectors globally including in Sub-Saharan Africa. There is no doubt that the geopolitical challenges and supply chain disruptions have an impact on women's economic opportunities. However, this is not captured in the report as the Russia-Ukraine war started after data collection was completed.
- Gender-based violence (GBV) harms many women and girls across Sub-Saharan Africa and beyond. The Pathways Study reports cover GBV under Normative barriers (sub-section 4.2.3) and highlight its different forms. Beyond analytical findings, some specific recommendations (across policy/advocacy, programming and research) are made to tackle GBV on a sectoral basis, which was the research focus. However, tackling GBV in girls and students requires specific inquiry and responses which go beyond the scope of this study.

Other Topics

Most recommendations are made without reference to specific stakeholders (e.g., faith-based groups, interest-based groups). The operations and belief systems of this rich variety of potential stakeholders also varies across the 13 countries covered. The Pathways Study sought to make recommendations relevant to all stakeholders involved in policy development and programming, regardless of their specific areas of application.


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