

Operational Practices and Lessons of Ethiopia's Hawassa Industrial Park, East Africa

Girma Melese Mengistu

Abstract

Industrial parks have played a crucial role in ensuring economic growth of developing countries. Besides, representing socio-economic achievements, operational industrial parks, on the other side, have exposed various issues that need to be addressed. This study, therefore, aims to assess the major contributions of Hawassa Industrial Park (HIP) to the national economy, but on the other hand, it investigates the main challenges and gaps of the park for proper and effective operation. This study applied both quantitative and qualitative approaches to collect data through questionnaire from 250 employees and interviews with representatives of manufacturing enterprises as well as government institutions supporting them to operate in the park. Results of the study indicate that HIP has positive impact on the national economy in terms of capital investment, job creation, enhance export and foreign currency. It also reveals that inefficient delivery of one-stop-shop (OSS) services, high turnover and instability are among the big challenges that the park has faced. Recommendations for future research are also discussed. Finally, limitations and implications of the present study are also discussed.



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Introduction

The birth and development of industrial parks in developing economies is an inevitable requirement for speeding up industrialization and ensuring economic growth. Ethiopia's industrialization approach includes developing specialized industrial parks, maintaining social and environmental sustainability, building vertically integrated industries, and enhancing skills development and achieving all these through strong collaboration with the private sector. In the African context, Ethiopia is replicating the experience of East Asian countries such as China and Malaysia, which have made an extensive use of industrial parks or SEZs to attract foreign investment and push their industrialization. The nation identifies industrial parks as one of the means for industrialization specially for specific manufacturing industries including textiles and apparel, pharmaceuticals, leather and leather products, among others. The selection of these sectors is to maximize Ethiopia's comparative advantages. Ethiopia's economic growth clearly stands out. The country has made a considerable progress in economic and social development since 1992 as a result of the implementation of favorable policies and strategies that are instrumental in improving the national economy. The nation has put in place an industrial park development program to enhance the inflow of FDI by improving the investment climate and providing attractive incentive packages. The government of Ethiopia's overarching plan is to make the country the leading manufacturing hub in Africa by 2025. As the industrial park economy has now become a global trend, the East Africa nation has built over 20 state-of-the-art industrial parks specialized industrial parks in strategic locations. Industrial parks are one of the most important factors supporting positive economy development with high economy turnover and high employment by attracting investment in the manufacturing sector. Currently, most of the parks have become operational and attracted foreign investors, thereby upgrading the industry and generating substantial sums of foreign currency by exporting apparel, textile, footwear and leather products to the global market. The export from the parks has been continually increasing in volume and value. The industrial parks have now contributed significantly to the industrial development in terms of increasing production and productivity, diversifying the industrial products and rising government revenue from export. The economic growth in Ethiopia is progressing at an impressive rate, where industrial parks have piqued the interest of international investors in the country's economy [1]. The industrial parks are also serving as a fuel for spurring industrialization through skill and technology transfer, creating job opportunities to citizens, addressing capital shortage through generating foreign earnings, and creating long-term dynamic effect on the local economy. Industrial parks have also facilitated in establishing links to global value chains through participating in international competition. Of the total operational industrial parks, HIP is currently contributing a lot by generating almost half of the total exports from the industrial parks in value. The park has also benefiting the local community by creating about ample jobs to citizens and through skill and technology transfer (EIC, 2020). Sweden's H&M, the world's second-biggest fashion retailer, the United States fashion supplier PVH (Calvin Klein, Tommy Hilfiger), Wuxi Jinmao Co.Ltd, Arvind Ltd., Best Co. Pvt. Ltd, Hirdaramani Garment PLC, Hela Clothing Group, Quadrant Apparel Group PLC, Raymond and Silver Spark Apparel Ltd, TAL Apparel, Indochine International, Bussana Apparel Group, Giangsu Golden Island Group, Chargeurs are among the well-known companies operating at the park. This, in fact, clearly indicates that the industrial park is playing important role in promoting the inflow of FDI to the east Africa country. This paper reviews the overall contribution of Hawassa industry park to the national economy by attracting FDI, generating more foreign currency from export, creating ample jobs for citizens, implementing skill and technology transfer on the industry, increasing production and productivity as well as other practical achievements. The paper also examines the main challenges and gaps of the

specialized park for effective and proper operation. Finally, the author presents his thoughts on the improvement of OSS services provided at HIP and the overall efficiency of the park.

Literature review

The concept of Industrial Park or Special Economic Zones (SEZ) dated back to the industrial revolution of the 18 Century when countries established industrial areas to facilitate industrialization. Some literatures shows that industrial parks or zones initially appeared in 1704. Free zones were originally established to encourage entry port trade, and mostly took the form of city wide zones located on international trade routes in Gibraltar (1704), Singapore (1819), Hong Kong (China 1848), Hamburg (1888), and Copenhagen (1891) can be worth mentioned [2]. Industrial park is based on a philosophy of integration of relatively different functions into an industrial area with majority of industrial production and services with high economy turnover and high employment [3]. Industrial parks are one of the most important factors supporting the economic development of a country. Various definitions of industrial park have been made, but the definition which was made by United Nations Industrial Development Organization (UNIDO) is considered to be the broadest term. According to UNIDO's definition of industrial park or the more general term special economic zone (SEZ), as: "...A tract of land developed and subdivided into plots according to a comprehensive plan with or without built-up (advance) factories, sometimes with common facilities and sometimes without them, for the use of a group of industrialists (UNIDO, 2015)." According to Ethiopian Industrial Park Proclamation, the term "Industrial Park" is defined as "an area with distinct boundary designated by the appropriate organ to develop comprehensive, integrated, multiple or selected functions of industries, based on a planned fulfillment of infrastructure and various services such as road, electric power and water, one stop shop and have special incentive schemes, with a broad view to achieving planned and systematic, development of industries, mitigation of impacts of pollution on environment and human being and development of urban center, and includes special economic zones, technology parks, export processing zones, agro-processing zone, free trade zones and the like designated by the Investment Board" (Federal Legislative, 2015). In fact, the idea of industrial park was based on several principles which most of all included allocation of specialized infrastructure in selected areas with the aim of decreasing costs connected to building infrastructure, and, furthermore, capability of a country to attract new investors, which would eliminate social and ecological impacts caused by industrial production. Under the impulse of globalization and world trade many countries have scrapped efforts to promote import substitution and are now emphasizing export-led development strategies. Thus, the East Africa nation is also taking a range of policy and strategic measures to facilitate the move towards industrial development. To this end, Ethiopia has put in place an industrial park development program. This is apart from the national endeavors to attract foreign direct investment (FDI) through the employ of the ordinary investment regime, according to Ethiopian Investment Report (2017). Nowadays, the nation has already established and made operational a number of industrial parks specialized in apparel and textile, leather and leather products, pharmaceuticals, agro-processing and other priority sectors in strategic locations so as to promote and attract foreign direct investment (FDI) and thereby upgrading the industry.

Research objective

The main purpose of this research is to assess the socio-economic contribution of Hawassa Industrial Park to the national economy, but on the other hand, to explore the main challenges of the park for proper and effective operation.

Research methodology

In this study both quantitative and qualitative approaches were applied. The quantitative approach was used to collect data through questionnaires. Participants of the study were employees of 22 enterprises operating at Hawassa industrial park, located in Southern Ethiopia. Among the employees, over 90% of them were daily laborers whereas the remaining were case team leaders, process owners, line managers. In this study, SPSS was used to analyze the statistical data. Moreover, qualitative method was used to gather data through serious of interviews to explore the perception, attitude, and experiences of the representatives and managers of the textile and apparel manufacturing enterprises as well as supporting government institutions operating at the park.

RESULTS

Overview of the Respondents

In this study, the researcher planned to distribute the questionnaires for 250 respondents who are working at Hawassa Industrial Park. However, of the total questionnaires disseminated among the respondents, 246 of them were collected and analyzed. The response rate of questionnaires is therefore, 98.4%. In addition, face-to-face interviews were conducted with managers of enterprises operating at HIP, branch managers of Ethiopian Investment Commission (EIC) and Industrial Park Development Corporation (IPDC), officials of Hawassa City Administration of SNNP regional state, Ministry of Labor and Social Affairs and other key informants of the target population who are important to this study. First of all, the demographic profile of the respondents was presented below.

Demographic profile of the respondents

In this section, the demographic information of the respondents is presented. This tried to gather information concerning personal and professional demographic characteristics of the respondents. Accordingly, the following variables about the respondents were summarized and described in the subsequent figure below. These variables include: gender, age, marital status and level of education of the respondents.

Table 1: Demographic profile of the respondents

R.No.	Variables	Description	Frequency	Percent
1	Gender	M	47	19.1
		F	199	80.9
		Total	246	100
2	Age	18-25 years	188	76.4
		26-35 years	31	12.6
		36-44 years	20	8.1
		45 and + years	7	2.8
		Total	246	100
3	Level of education	Primary education	6	2.4
		Secondary education	168	68.3
		Diploma	39	15.9
		First degree	28	11.4
		Masters degree and above	5	2.0
		Total	246	100
4	Marital status	Single	192	78.0
		Married	50	20.3
		Divorce	4	1.6
		Total	246	100

Source: Survey data, 2020

The demographic profile of the respondents indicated that of the total 246 respondents at Hawassa Industrial Park, majority of the employees (81%) are female; only 19% of them are male. Concerning their age, majority of the employees (76.4%) are between the age of 18-25 years or youngsters. Besides, some 31 respondents or (12.6%) are between the age of 26-35 years and 20 respondents or (8.1%) of them are between 36-44 years. Only few of the respondents (3%) are 45 years of age and above. As far as their level of education is concerned, of the total, most of the respondents (68.3%) are at secondary education level and few of them (2.4%) are at primary education level. Moreover, of the total, some 39 respondents or (16%) are diploma holders; some 28 of them (11.4%) have received first degree and the remaining few respondents (2%) have MA degree. Regarding their marital status, of the total respondents majority of them (78%) are single where as the remaining (20.3%) of them are married. Only few respondents or (1.6%) of them are divorced.

Data Analysis

In this section, the responses of the respondents on the questionnaires are interpreted as depicted hereunder. Using SPSS, the results of 20 questions are summarized by frequency tables along with percentages and cross tabulation separately with their respective interpretations.

Table 2: Working position

Qn. 1 What is your working position in the enterprise?	Gender				Total	
	Male		Female		Frequency	Percentage
	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
Cutting operator	4	1.62%	40	16.3%	44	17.9%
Sewing	31	12.6%	102	41.5%	133	54.1%
Design	7	2.84%	14	5.7%	21	8.5%
Line production operator	1	0.4%	21	8.53%	22	8.9%
Quality testing officer	2	0.81%	12	4.9%	14	5.7%
Supervisor	2	0.81%	10	4.1%	12	4.9%
Total	47	19.1%	199	80.9%	246	100%

Source: Survey data, 2020

As far as position of the respondents who are working at Hawassa industrial park is concerned, of the total, more than half of the employees (54.1%) are engaged in sewing, of which 41.5% of them female and 12.6% male. Besides, some 44 respondents or (18%) of them are cutting operators, of which 16.3% are female and the remaining 1.6% male. Of the total respondents, other 8.5% and 9% of them are working in designing and at the position of line production operator respectively; of which most of them are female in both working positions. Moreover, of the total, some 14 respondents (5.7%) and others 12 respondents (5%) are serving as quality testing officer and at supervisor position respectively, in both cases most of them are female.

Table 3: Duration of your employment

Qn. 2 Duration of your employment in the enterprise?	Gender				Total	
	Male		Female		Frequency	Percentage
	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
Less than 1 Year	16	6.5%	47	19.1%	63	25.6%
From 1- 2 Years	9	3.6%	74	30.1%	83	33.7%
From 2- 3 Years	14	5.7%	47	19.1%	61	24.8%
From 3- 4 Years	5	2.0%	13	5.3%	18	7.3%
Over 4 Years	3	1.2%	18	7.3%	21	8.5%
Total	47	19.1%	199	80.9%	246	100%

Source: Survey data, 2020

Concerning duration employment of the respondents, of the total majority (59.3%) have worked at the enterprises for two and less than two years, of which almost half of them (49.2%) are female and the remaining 10% male. Furthermore, quarter of the respondents (24.8%) said that they have worked at their enterprises from 2-3 years and (7.3%) of them from 3-4 years respectively. Only 21 respondents or (8.5%) of them replied that they have worked for the enterprises for 4 years and above.

Table 4: Salary per month

Level of education	Qn. 3 How much salary do you earn monthly?											
	Less than 1,500 ETB		Between 1,500 - 2, 500 ETB		Between 2,501 - 3,500 ETB		3,501 - 4,500 ETB		Above 4,500 ETB		Total	
	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per
Primary education	4	1.6%	2	0.8%	0	0%	0	0%	0	0%	6	2.4%
Secondary education	53	21.5%	101	41.0%	14	5.7%	0	0%	0	0%	168	68.3%
Diploma	3	1.2%	19	7.7%	17	6.9%	0	0%	0	0%	39	15.8%
First degree	0	0%	0	0%	5	2.0%	23	9.3%	0	0%	28	11.4%
Masters degree and above	0	0%	0	0%	0	0%	0	0%	5	2.0%	5	2.0%
Total	60	24.4%	122	49.6%	36	14.6%	23	9.3%	5	2.0%	246	100%

Source: Survey data, 2020

Regarding the salary of the respondents, of the total, half of them (49.6%) replied they earn between 1,500 and 2,500 Ethiopian birr, of which most of them (42%) are at primary and secondary education level. Of the total, almost quarter of the respondents (24.4%) are paid less than 1,500 Ethiopian birr. Moreover, some 23 respondents or (9.3%) of them replied that they earn between 3,501 and 4,500 Ethiopian birr per month; the remaining insignificance number of respondents (2%) earn over 4,500 Ethiopian birr.

Table 5: Job satisfaction

Qn.4 How much are you happy with your work?	Gender				Total	
	Male		Female		Frequency	Percentage
	Frequency	Percentage	Frequency	Percentage		
Very much happy	1	0.4%	7	2.8%	8	3.2%
Happy	9	3.6%	17	6.9%	26	10.6%
Unhappy	8	3.2%	60	24.4%	68	27.6%
Very unhappy	28	11.4%	106	43.1%	134	54.5%
No comment	1	0.4%	9	3.6%	10	4.0%
Total	47	19.1%	199	80.9%	246	100%

Source: Survey data, 2020

As far as job satisfaction of the respondents is concerned, of the total, more than half of them (54.5%) said they are extremely unhappy with their job; over a quarter of the respondents (27.6%) are not happy, of which 67.5% of them are female and 14.6% male. On the contrary, of the total, some 26 respondents or (10.6%) of them are pleased with their job and 8 of them (3.2%) are extremely happy with their job. Exceptionally, some 10 respondents or (4%) of them replied that they have no comment on this issue.

Table 6: Payment satisfaction (by level of income Cross tabulation)

Qn.5 How much are you satisfied with your salary?	Salary per month										Total	
	Less than 1,500 ETB		Between 1,500 - 2, 500 ETB		Between 2,501 - 3,500 ETB		3,501 - 4,500 ETB		Above 4,500 ETB		Freq	Per
	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per		
Very much satisfied	1	0.4%	3	1.21%	1	0.4%	1	0.4%	0	0.0%	6	2.4%
Satisfied	4	1.6%	8	3.2%	3	1.21%	0	0.0%	1	0.4%	16	6.5%
Unsatisfied	40	16.3%	72	29.3%	16	6.5%	12	4.9%	3	1.21%	143	58.1%
Highly unsatisfied	13	0.3%	30	12.2%	15	6.1%	5	2.0%	0	0.0%	63	25.6%
No comment	2	0.81%	9	3.6%	1	0.4%	5	2.0%	1	0.4%	18	7.3%
Total	60	24.4%	122	49.6%	36	14.6%	23	9.3%	5	2.0%	246	100%

As far as payment satisfaction of the respondents is concerned, of the total, majority of them (58.1%) are dissatisfied with the salary they received from the enterprises. Likewise, some 63 respondents or (25.6%) of them replied that they are highly dissatisfied with it. In contrast, of the total respondents, only 6 of them (2.4%) confirmed that they are highly satisfied with their monthly salary and other 16 respondents or (6.5%) are satisfied with it. Only, some 18 respondents or (7.3%) of them replied that they are not willing to comment on this issue.

Table 7: Other source of income of employees (by working position)

	Qn.6 Do you have any other source of income other than from this company?						Total	
	Yes		No		No comment			
Work position	Freq	Per	Freq	Per	Freq	Per	Freq	per
Cutting operator	8	3.2%	35	14.2%	1	0.4%	44	17.9%
Sewing	34	13.8%	96	39.0%	3	1.2%	133	54.1%
Design	5	2.0%	16	6.5%	0	0%	21	8.5%
Line production operator	2	0.8%	20	8.1%	0	0%	22	8.9%
Quality testing officer	5	2.0%	8	3.2%	1	0.4%	14	5.7%
Supervisor	3	1.2%	9	3.6%	0	0%	12	4.9%
Total	57	23.2%	184	74.8%	5	2.0%	246	100%
Qn.7 If your answer is 'yes' for the above question, please mention the other source of income.	Family support		Working extra time		No comment		Total	
	Freq	Per	Freq	Per	Freq	Per	Freq	Per
Male	5	2.0%	3	1.2%	0	0%	8	3.2%
Female	31	12.6%	15	6.1%	3	1.2%	49	19.9%
Total	36	63.2%	18	31.6%	3	5.3%	57	100%

Source: Survey data, 2020

Regarding other source of income of the respondents is concerned, of the total, 57 respondents or (23.2%) confirmed that they have another source of income for their living; most respondents who have other source of income are female. On the other hand, majority of the respondents (74.8%) replied that they have no other income and they live only on their monthly salary. Exceptionally, some 5 respondents (2%) replied that they have no comment on this issue. In a related issue, of the total respondents who have confirmed that they another sources of income in addition to their monthly salary, 49 or majority respondents (86%) are female and the remaining 8 of them (14%) are male.

Table 8: Training provided by the enterprises

	Qn.8 Have you ever been provided any form of training by the enterprise?						Total	
	Yes		No		No comment			
Work position	Freq	Per	Freq	Per	Freq	Per	Freq	Per
Cutting operator	42	17.1%	1	0.4%	1	0.4%	44	17.9%
Sewing	126	51.2%	3	1.2%	4	1.6%	133	54.0%
Design	21	8.5%	0	0%	0	0%	21	8.5%
Line production operator	22	8.9%	0	0%	0	0%	22	8.9%
Quality testing officer	13	5.3%	0	0%	1	0.4%	14	5.7%
Supervisor	12	4.9%	0	0%	0	0%	12	4.9%
Total	236	96.0%	4	1.6%	6	2.4%	246	100%

Source: Survey data, 2020

Concerning the trainings provided by the enterprises, of the total respondents, almost all of them (96%) confirmed that they have taken trainings. In contrast, only 4 respondents (1.6%) of them replied that they haven't taken any training that would help them to become more effective and efficient. Exceptionally, six respondents or (2.4%) of them said they have no idea on this issue.

Table 9: Effectiveness of training

		Qn. 9 Do you think the training (s) helpful to become more effective and efficient?						Total	
		Yes		No		No comment			
		Freq	Per	Freq	Per	Freq	Per	Freq	Per
Previous Qn. Have you ever been provided any form of training by the enterprise?	Yes	225	91.5%	3	1.2%	8	3.2%	236	95.9%
	No	4	1.6%	0	0%	0	0%	4	1.6%
	No comment	6	2.4%	0	0%	0	0%	6	2.4%
	Total	235	95.5%	3	1.2%	8	3.2%	246	100%

Source: Survey data, 2020

As far as the significance of the training is concerned, of the total, almost all the respondents (95.5%) who have already taken the trainings said that the trainings are helpful to become more effective and efficient on their daily work activities. On the other hand, of the total, only three respondents or (1.2%) of them replied the trainings were not useful so as to improve their profession and become effective and efficient. Only, 8 respondents (3.2%) of them said nothing on this issue.

Table 10 Acquiring skills and knowledge

		Qn.10 Have you acquired any knowledge and skills by working in the industrial park?						Total	
		Yes		No		No comment			
		Freq	Per	Freq	Per	Freq	Per	Freq	Per
	Cutting operator	40	16.5%	2	0.8%	2	0.8%	44	17.9%
	Sewing	119	48.4%	5	2.0%	9	3.6%	133	54.1%
	Design	17	6.9%	2	0.8%	2	0.8%	21	8.5%
	Line production operator	21	8.5%	0	0%	1	0.4%	22	8.9%
	Quality testing officer	11	4.5%	2	0.8%	1	0.4%	14	5.7%
	Supervisor	12	4.9%	0	0%	0	0%	12	4.9%
	Total	220	89.4%	11	4.5%	15	6.1%	246	100%

Source: Survey data, 2020

Regarding the skills and knowledge of the respondents, majority of them (89.4%) said that they have acquired skills and knowledge while working at Hawassa industrial parks. In contrast, only few respondents (4.5%) replied they haven't acquired skills and knowledge working at the park. Exceptionally, some 15 respondents or (6.1%) of them didn't comment on this.

Table 11: Effectiveness of skills and knowledge at work

		Qn. 11 Do you think the skills and knowledge that you have acquired helped you fruitful in the enterprise or other related activities?						Total	
		Yes		No		No comment			
		Freq	Per	Freq	Per	Freq	Per	Freq	Per
Previous Qn. Have you acquired any knowledge and skill by working in the industrial park?	Yes	198	80.5%	12	4.9%	10	4.1%	220	89.4%
	No	8	3.2%	1	0.4%	2	0.8%	11	4.5%
	No comment	13	5.3%	2	0.8%	0	0%	15	6.1%
	Total	219	89.0%	15	6.1%	12	3.2%	246	100%

Source: Survey data, 2020

Concerning the effectiveness of the skills and knowledge that the employees acquired while working at Hawassa industrial park is concerned, of the total, majority of the respondents (89%) have agreed that the skills and knowledge that they obtained from the industrial park helped them to become fruitful in the enterprise and other related work activities. However,

some 15 respondents or (6.1%) of them didn't agree with this idea. Of the total, some 12 respondents or (3.2%) of them didn't comment on this issue.

Table 12: Usage of personal protective equipment (PPE)

		Qn. 12 How often do you use personal protective equipment (PPE) at work?								Total	
		Frequently		Sometimes		Rarely		No comment			
		Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per
	Male	37	15.0%	4	1.6%	6	2.4%	0	0%	47	19.1%
	Female	162	65.8%	22	8.9%	9	3.6%	6	2.4%	199	80.9%
	Total	199	80.9%	26	10.6%	15	6.1%	6	2.4%	246	100%

Source: Survey data, 2020

As far as the usage of personal protective equipment (PPE) at work is concerned, of the total respondents, majority of them (81%) confirmed that they have frequently used the personal protective equipment (PPE) on duty, of which 66% are female and 15% male. Moreover, of the total, 26 respondents or (10.6%) of them replied they have used the personal protective equipment sometimes. On the contrary, some 6.1% of the respondents said they are rarely using PPE at work place. Exceptionally, few respondents or (2.4%) of them said they have no comment on this issue.

Table 13: Communication barriers with expatriates

	Qn. 13 Do you face communication barriers with expatriate supervisors?							Total	
	Yes		No		No comment				
	Freq	Per	Freq	Per	Freq	Per	Freq	Per	
Cutting operator	7	2.8%	36	14.6%	1	0.4%	44	17.9%	
Sewing	7	2.8%	117	47.6%	9	3.6%	133	54.1%	
Design	1	0.4%	20	8.1%	0	0%	21	8.5%	
Line production operator	1	0.4%	20	8.1%	1	0.4%	22	8.9%	
Quality testing officer	1	0.4%	13	5.3%	0	0.4%	14	5.7%	
Supervisor	0	0%	11	4.5%	1	0.4%	12	4.9%	
Total	17	6.9%	217	88.2%	12	4.9%	246	100%	

Source: Survey data, 2020

Regarding the communication gap that the respondents may encounter with expatriate supervisors at work, of the total respondents, majority of them (88.2%) said they haven't faced communication gap or barrier working with foreign supervisors on duty. In contrast, 17 respondents or (7%) of them replied that they have faced communication barrier while working with expatriate supervisors at work. Only, some 12 respondents or (5%) of them haven't comment on this issue.

Table 14: Benefit packages

	Qn.14 Being an employee, what benefits you have received from the enterprise?												Total	
	Transport service		Lunch subsidy		Full attendance extra payment		Position allowance		Most of the benefits		None of the benefits			
	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per
Cutting operator	10	4.1%	4	1.6%	1	0.4%	0	0%	29	11.8%	0	0%	44	17.9%
Sewing	35	14.2%	22	8.9%	11	4.5%	0	0%	62	25.2%	3	1.2%	133	54.1%
Design	4	1.6%	5	2.0%	2	0.8%	0	0%	10	4.1%	0	0%	21	8.5%
Line production operator	4	1.6%	4	1.6%	0	0%	0	0%	14	5.7%	0	0%	22	8.9%
Quality testing officer	4	1.6%	1	0.4%	1	0.4%	0	0%	8	3.2%	0	0%	14	5.7%
Supervisor	0	0%	3	1.2%	0	0%	6	2.4%	3	1.2%	0	0%	12	4.9%
Total	57	23.2%	39	15.8%	15	6.1%	6	2.4%	126	51.2%	3	1.2%	246	100%

As far as the benefits that the respondents have received from their enterprises, more than half of the respondents (51.2%) replied that they have enjoyed most of the benefits provided by the enterprises. Moreover, of the total, 57 respondents or (23.2%) of them have received transport service and 39 of them or (15.8%) of them lunch subsidy benefits respectively. Of the total, some 15 respondents or (6.1%) of them said they are benefited from full attendance extra payment. Only six respondents (2.4%), who are at supervisor position, said they are receiving position allowance. On the other hand, three respondents (1.2%) replied that they are not receiving any types of benefit from the enterprises.

Table 15: Labor supervision by the Government body

		Qn. 15 Is there any form of labor supervision by the government offices?						Total	
		Yes		No		No comment			
		Freq	Per	Freq	Per	Freq	Per	Freq	Per
Cutting operator		32	13.0%	5	2.0%	7	2.8%	44	17.9%
Sewing		87	35.4%	21	8.5%	25	10.2%	133	54.1%
Design		17	6.9%	2	0.8%	2	0.8%	21	8.5%
Line production operator		14	5.7%	5	2.0%	3	1.2%	22	8.9%
Quality testing officer		10	4.1%	0	0%	4	1.6%	14	5.7%
Supervisor		11	4.5%	0	0%	1	0.4%	12	4.9%
Total		171	69.5%	33	13.4%	42	17.1%	246	100%

Source: Survey data, 2020

Concerning the labor supervision carried out by the government bodies at the industrial park, of the total respondents most of them (69.5%) confirmed the supervision. On the contrary, some 33 respondents or (13.4%) of them said that labor supervision is not carried out by the government offices at the park. Exceptionally, other 42 respondents or (17%) of the respondents said that they have no comment on this issue.

Table 16: Employees satisfaction on company's administration

	Qn.16 How much are you satisfied with the administration of your company?										Total	
	Extremely happy		Happy		Unhappy		Extremely unhappy		No comment			
	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per
Male	1	0.4%	9	3.6%	29	11.8%	6	2.4%	2	0.8%	47	19.1%
Female	1	0.4%	29	11.8%	137	55.7%	29	11.8%	3	1.2%	199	80.9%
Total	2	0.8%	38	15.4%	166	67.5%	35	14.2%	5	2.0%	246	100%

Source: Survey data, 2020

As far as the employees' satisfaction on the administration of the enterprises is concerned, of the total respondents, majority of them (67.5%) said that they are not happy. Furthermore, some 35 respondents or (14.2%) of them replied that they are extremely unhappy with the administration of the enterprises. Of the total, only 38 respondents (15.4%) of them said that they are happy with the administration; two respondents (0.8%) said they are extremely pleased with the administration. Only five respondents or (2.0%) of them didn't comment on it.

Table 17: Employees interest to start own business

	Qn.17 Do you plan to start your own small business in the future?							Total	
	Yes		No		No comment				
	Freq	Per	Freq	Per	Freq	Per	Freq	Per	
Male	17	6.9%	20	8.1%	10	4.1%	47	19.1%	
Female	68	27.6%	78	31.7%	53	21.5%	199	80.9%	
Total	85	34.6%	98	39.8%	63	25.6%	246	100%	
Qn.18 If your answer is 'yes' for the above question, in which area that you plan to engage in?	In the apparel sector		In another sector		Not yet decided		Total		
	Freq	Per	Freq	Per	Freq	Per	Freq.	Per	
Male	12	4.9%	3	1.2%	2	0.8%	17	6.9%	
Female	50	20.3%	12	4.9%	6	2.4%	68	27.6%	
Total	62	72.9%	15	17.6%	8	9.4%	85	100%	

Source: Survey data, 2020

Regarding employees' interest about starting their own business using the skills or knowledge that they have acquired, of the total, 85 respondents or (34.6%) of them confirmed that they plan to begin their own small business. Of which, 27.6% of them are female and the remaining 7% are male. On the other hand, of the total respondents, 40% of them said that they have no plan to start their own business. Exceptionally, quarter of the total respondents (25.6%) didn't comment on this issue. Meanwhile, among the respondents who have shown interest to start their own business, 62 of them said that they plan to engage in the apparel sector. However, some 15 respondents or (17.6%) of them replied that they are planning to start their own small business rather than apparel or garment sector. The remaining significance number of respondents or (9.4%) of them have not yet decided the sector they will engage in till now.

Table 18: Employees satisfaction on company's administration

	Qn. 19 How do you manage your issues with the enterprise related to salary, transportation, and other problems?										Total	
	Discussing with 37 rganizat supervisors		Complaining in groups to enterprise's officials		Being absent/late from work		Work Strike		No comment			
	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per	Freq	Per
Cutting operator	28	11.4%	4	1.6%	6	2.4%	4	1.6%	2	0.8%	44	17.9%
Sewing	71	28.9%	38	15.4%	9	3.6%	8	3.2%	7	2.8%	133	54.1%
Design	12	4.9%	8	3.2%	0	0%	0	0%	1	0.4%	21	8.5%
Line production operator	12	4.9%	4	1.6%	4	1.6%	0	0%	2	0.8%	22	8.9%
Quality testing officer	9	3.6%	3	1.2%	2	0.8%	0	0%	0	0%	14	5.7%
Supervisor	7	2.8%	3	1.2%	1	0.4%	0	0%	1	0.8%	12	4.9%
Total	139	56.5%	60	24.4%	22	8.9%	12	4.9%	13	5.3%	246	100%

Source: Survey data, 2020

As far as managing various issues or complaints that the respondents encounter while on duty, more than half of them (56.5%) said that they prefer to discuss and resolve the issue with immediate supervisors. Of the total, a quarter of the respondents (24.4%) replied that whenever they have various issues they prefer to manage by complaining in groups to the officials of the enterprises. Some 22 respondents or (9%) of them said they manage the situation by being late or absent from work. Only 12 respondents or (5%) of them replied that work strike can solve the problem. Exceptionally, some 13 respondents or (5.3%) didn't like to comment on this issue.

Content Analysis

Based on the proposal designed for this purpose, qualitative data was collected from the primary sources using in-depth interviews to appraise the major success and limitations of Hawassa Industrial Park of Ethiopia. In this section, the analyses drawn from interviews with branch managers of Ethiopian Investment Commission (EIC), Industrial Park Development Corporation (IPDC) at the park, managers of enterprises operating in the park, officials of Hawassa City Administration of the SNNP regional state, Ministry of Labor and Social Affairs as well as representative of the local community as it would help the researcher to draw conclusions and forward some possible suggestions about the issue. Accordingly, based on the interviews conducted with all the concerned key informants of the target population, the findings are summarized as follows:

Major success of Hawassa Industrial Park EIC and IPDC

- The interviewee from Ethiopian Investment Commission (EIC) expressed that Hawassa industrial park is the first and largest sustainable apparel and textile park in the country. The eco-industrial park is situated at the heart of Hawassa city and built-up an area of 1.4 million meter square (140ha). Besides, the park has a total of 52 sheds i.e. 11 sheds of 11,000 m², 35 sheds of 5,500 m², and six specialized sheds (tailored to the needs of investors). Inaugurated in 2016 with modern technology and world class infrastructures like zero liquid discharge technology (ZLD) and adheres to global quality/audit certification including Customs-Trade Partnership Against Terrorism (C-TPAT), Hawassa specialized industry park has been playing crucial role in promoting foreign direct investment (FDI) and attracting popular foreign companies to invest in Ethiopia.
- Similarly, the respondent from Industrial Park Development Corporation (IPDC) explained that Hawassa industrial park located in the SSNP region, 275 Km south of Addis Ababa, applauded as Ethiopian flagship park specializes in textile and garment. The park was built at a cost of 246 million USD after the government succeeded its attempt to get a finance source of a one billion dollar oversubscribed debut Eurobond from Europe and the United States of America. The park was built by well-known Chinese contractor CCECC fulfilling international standards to finish the overall construction work in record time of less than one year. Since its inauguration, the park has been promoting the country's investment potential to foreign investors.
- According to the interviewee from EIC, currently, the eco-industrial park hosts 22 enterprises, of which most of them are globally renowned apparel and textile manufacturers. Famous brands of the world like PVH, Calvin Klein, H&M, Lee, Wrangler Jeans, high brand sportswear and other popular brands are manufactured at the park. This, of course, plays a significant role in building the good image of the country to the international community apart from attracting further foreign direct investment (FDI) that would ultimately ensure sustainable economic development and take the country to a middle-income status.
- In a similar way, the respondents from IPDC confirmed that Ethiopia aspires to be the most suitable destinations for investment and a manufacturing hub in Africa. To this effect, the country has decided to seize the opportunity presented by increasing the cost of labor in east Asian countries like China and attract migratory investors by erecting modern industrial parks and to boost exports in the light manufacturing industry particularly in the textile and apparel sector. Ethiopia has attracted globally renowned apparel, textile, fashion and design companies to its eco-industrial park. Hawassa IP, the modern and largest park in Africa, has a water and waste treatment plant which uses the latest technology for treating and recycling about 90% of the water used in the park. A zero-liquid discharge (ZLD) facility has already been set up with a daily processing capacity of 11 million liters of effluent. Accordingly, the nation could

manage to attract renowned apparel makers from different corners of the world within some years.

- The respondent further stated that EIC has ensured the industrial park enterprises get streamlined lined one-stop shop service (OSS) including processing & insurance of permits, licenses, registration certificates, agreements, tax identification number, customs clearance, banking service, telecom, power and loan and other related facilities.
- In the same way, the interviewee from IPDC expressed that the provision of all these services in one window can speed up the activities of manufacturing enterprises, offer cost and time benefits, avoid governmental bureaucracy and is likely to have a remarkable effect on the competitiveness and improve export performance of the enterprises.
- Even though the export performance of Hawassa industrial park is poor, its performance is much better comparing to other operational industrial parks in Ethiopia, according to the interviewee from EIC. To indicate this in figure, of the total 140 million US dollars that the nation secured in 2019 by exporting textile and apparel, footwear, finished leather and other products from nine operational industrial parks, half of the revenue or 72.2 million USD secured from the export of Hawassa industrial park,
- The interviewee from IPDC said that when the industrial park was constructed, the displaced households from the project site were offered compensation for market value of the land asset, the property they own and plot of land for house construction in the area. They were also provided with employment and skill development opportunities so as to work at the park. The government has constructed residential houses to the local communities who were displaced by the construction of the HIP. As a result, the community and the park administration have good and very healthy relations.

Enterprises operating at HIP

- When asked about what initiated to invest in Hawassa industrial park of Ethiopia, the interviewees from the enterprises expressed that Ethiopia is among the few nations that have conducive investment climate and policy among the developing economies in the world. Moreover, Hawassa industrial park is the largest and state-of-the-art technology that would enable to achieve better production and export high quality textile and apparel products to the global market. In fact, investing in the industrial park sector of Ethiopia has attractive incentives package such as income tax exemption period, loss carry forward, export tax exemption and exemption from customs duty as well as free repatriation of profit and market access. Besides, the abundant availability of competitive labor force, provision of subsidized utilities (like water and electric power, etc.) and receiving expedited procedures in terms of licensing, permits, registration certificates, tax identification number, customs clearance are among the benefits that enable the enterprises more competitive.
- The respondents also stated that apart from having conducive investment climate, the flourishing industrial parks across the country are the pulling factor to invest in the east Africa nation. The government is committed to support investors and large scale investments on infrastructure such as energy, electric-driven railways (connecting cities to the Port of Djibouti) have been undertaken across the country. Being Africa's aviation hub, Ethiopian Airlines flies to over 100 international destinations and 45 dedicated cargo destinations. Regarding market factors, the nation is in a strategic location with proximity to major global markets including European Union, Middle East and USA. Besides, the nation enjoys duty free market access to the USA and EU through the AGOA and EBA initiatives respectively. Availability of abundant and easily-trainable labor at globally competitive rates as well as competitive utility rates of electricity and water can be mentioned as other investment opportunities.

- According to the interviewees, the industrial park program that focuses on comparative advantage can quickly attract foreign direct investment (FDI). Thus, the comparative advantages includes provision of industrial park incentives (fiscal and non-fiscal incentives protections) targeted to increase export performance like import duty exemption (100% of total value for industrial park enterprises that are fully exporters), export duty exemption (on all products except semi-processed hides and skin), loss carry forward. The government also avails dedicated power station for industrial parks, maintaining high environmental standards through the use of renewable energy and zero liquid discharge (ZLD) technology, competitive labor and market access preferences, provision of one stop service, reliable electricity at globally competitive rate are among others.
- The respondents further explained that the provision of various subsidized utilities and services under one-stop shop (OSS) service to facilitate a 'plug-and-play' process for resident enterprises are among the main advantages working at Hawassa specialized industrial park. They said that they have been enjoying the one-stop services that includes processing and issuance of permits, licenses, registration certificates, agreements, tax identification number, customs clearance, banking and after care services under EIC. According to the interviewees, other facilitations such as expedited visa procedure, customer facilitations through bonded warehouse and voucher scheme, right to own immovable property as per investment needs, right to employ expatriate managers and experts as well as right to open and operate foreign currency accounts are worth mentioned.

MoLSA, Hawassa City Administration & Local community

- The interviewee from Ministry of Labour and Social Affairs (MoLSA) expressed that as the government's vision is to make Ethiopia the leading manufacturing hub in Africa. The country is the second populous nation in Africa next to Nigeria. Of the total 105 million population, half of them or 55 million are active and easily trainable labor power. Furthermore, the nation has a growing educational labor force – more than 50 universities with around half million student population and over 1,350 Technical and Vocational Education Training (TVET) institutes with annual intake close to one million students. This is, of course, a golden opportunity to enhance the foreign direct investment (FDI).
- With implementing different strategies, the nation drew plans to offer a way of living for this workforce with transforming the economy into the industry from agriculture. The nation has a large pool of trainable work force available at competitive wages which plays an important role in achieving the desired goal. As its main duty, the Ministry in collaboration with the concerned bodies has been facilitating the provision of abundant human power to the park and also resolving the disputes that sometimes occur between the employee and employer, according to the interviewee from MoLSA.
- The respondents from Hawassa City Administration also explained that in developing economies like Ethiopia, foreign direct investment (FDI) has often been considered as a vital source for sustainable development for not only to the national economy but also for the local community. Hence, the industrial park has immense contribution in alleviating unemployment, poverty reduction and other socio-economic issues that prevails among the society. In addition to this the enterprises operating at the park have been discharging their corporate social responsibility and working closely with the City Administration and the local community.
- Similarly, the interviewees from the local community said that the park has of a paramount importance to speed up socio-economic development of the SNNP region at large and the surrounding community in particular. Generally, the local community has a positive perception about the park. This is because, the presence of HIP has lots of benefits to local communities in employment creation, technology transfer and infrastructural development. At present time,

Hawassa IP has created 25,000 jobs to the local community and more than half of them are from Hawassa city administration.

➤ On top of that the employees and the surrounding local communities have been benefited from the awareness creation radio programs broadcasted by HIP community radio every day that focus on health, HIV/AIDS, gender, environment, work safety, industrial peace and other issues for the last two years, according to the respondent from the local community.

Limitations of Hawassa Industrial Park EIC and IPDC

➤ The respondent from EIC expressed that high employees' turnover is the major challenge for the enterprises operating at Hawassa industrial park. Low payment and insufficient benefit packages are considered as the root cause of the high turnover at the park.

➤ The interviewee from EIC further stated that high logistics cost is among the main challenges that the enterprises operating at the park have faced. "They have been paying from 3,000 to 3,500 US dollars while transporting a 40 feet container of goods from the park to Port of Djibouti, which is even higher than marine cost."

➤ Similarly, the respondent from IPDC stated that high employees' turnover is the common problem followed by high logistics cost as well as transportation and housing problem of the employees. With a view to addressing especially the housing problem, IPDC has been strongly working with the enterprises and four firms are now undertaking various activities to launch the construction of dormitories to their employees.

➤ When asked about the export performance of Hawassa industrial park against its annual plan, the respondent from EIC confirmed that the government has set a plan to generate 1 billion US dollars per annum by exporting various textile and apparel products from Hawassa eco-industrial park. However, the export performance is not that much as it was expected. For instance, the park generated only 54 million US dollars and 72.2 million US dollars from the export of textile and apparel products in 2018 and 2019 respectively. With a view to improving the poor export performance, the government has been jointly working with the private sector and other stakeholders.

➤ In the same way, the interviewee from IPDC agreed that the eco-industrial park was expected to create 60,000 direct manufacturing jobs and generate one Billion USD per year by exporting the textile and apparel products to major markets in the world including USA, Europe and Asia. However, the employment creation has now reached 25,000 and the export performance in value is only 72 million USD in 2019, which is low performance in both cases against its plan.

Enterprises operating at HIP

➤ The interviewees from the enterprises said that even though working at Hawassa industrial park has its advantages, they came across some gaps and limitations in operational activities. Employees' labor turnover is the most common problem followed by high logistics cost, shortage of quality domestic raw-material supplier, and in some cases political instability and work strike that adversely affect production and export.

➤ The respondents further expressed that most employees have poor work culture and inefficient comparing with other countries. For instance, in the East Asia countries like China and Malaysia, the labor force is more efficient and effective than Ethiopia in the same manufacturing industry.

➤ According to the interviewees, the linkage between foreign and domestic investors inside and outside the park is very limited. This is because there are only two local firms operating at the park since it became operational. In addition, the foreign investors partnering with

domestic enterprises at the park is not given due attention by the concerned government body to achieve the dynamic benefits of industrial park technology transfer.

➤ The respondents also commented the existing operational activity at the park governed has some gaps. For instance, the absence of Ethiopian Textile Industry and Development Institute (ETIDI) service is a limitation of OSS services which is coordinated by EIC. ETIDI which is under Ministry of Trade and Industry (MoTI) is among the major actors in the textile and apparel industry and its service is necessary to enhance export quality especially by creating awareness and on-job trainings to the employees. Unfortunately, the institution has not yet fully provided the service to the enterprises.

➤ The interviewees further explained that even though some of the enterprises have a link of local suppliers (within and outside the industrial park) for raw materials demanded for the production process such as yarn and fabrics, the local raw material particularly from outside the industrial park is poor quality and could not meet the required standard. As a result, the enterprises heavily rely on expensive imported inputs. In fact, four enterprises operating at the park are supplying good quality raw materials which create market linkage among the enterprises and could save much time and money of the manufacturing firms, as well.

MoLSA, Hawassa City Administration & Local community

➤ When asked about the main challenge of HIP, the respondent from Ministry of Labor and Social Affairs (MoLSA) expressed the flourishing specialized industrial parks in Ethiopia have created vast employment opportunity for citizens across the country. However, the wages paid to works at HIP has been the main causes of conflict between the employees and employer. The least paid laborers are struggling to live with a monthly wage of USD 26 in the park. In order to protect the basic rights of workers in terms of safe working environment and livable wages, guarantee industrial peace and productivity, the labor law which was initiated by MoLSA had been reviewed, and thus, minimum wage rate would be set at the national level in the near future.

➤ Similarly, the interviewees from Hawassa City Administration and the local community commented that some enterprises in the park have been criticized for paying the employees negligible wages and providing poor working conditions. Housing is also another challenge that the employees face and they spend much of their monthly income for renting house.

Discussion

This study focuses on Ethiopia's recent experience with the industrial park sector through its strategic industrial policy specially to HIP, a modern, ecologically sensitive industrial park. The study has investigated the major achievements and challenges of Hawassa industrial park of Ethiopia. Considering the benefits of FDI for growth and development, the government of Ethiopia has undertaken extensive industrial parks development to propel economic growth resulting from creation ample job opportunities, generation of foreign currency through export diversification. The results of the study indicate that HIP has successfully promoted the investment potential of Ethiopia and attracted globally renowned textile and apparel companies and famous brands of the world. In the developing economies like Ethiopia, the main social benefit of industrial parks is the opportunity to create immense job opportunities for large number of local communities which has been realized at HIP, the flagship of Ethiopian industrial park. Nowadays, over 25,300 job opportunities have been created at the park that benefit citizens specially the local community. In the previous years, the country which was only known for exporting agricultural products that constitutes 86 percent of the total foreign exchange earnings has become a history. Currently, the nation has generated substantial sums of foreign currency from the export of textile and apparel products mainly from HIP.

Conclusion and Recommendation

Ethiopia is still seen by global brands as a preferred investment destination for textile and apparel sector due to abundant and competitive labour, political stability, modern industrial parks designated for the industry as well as reliable electricity in industrial parks. Accordingly, it is suggested that the government should attach importance to the improvement of the overall OSS services provided at Ethiopia's flagship textile and apparel industrial park and review the efficiency of the park operation so as to attract more famous brands of the world in the industry. As FDI facilitate economic growth, the government should exert much effort in mitigating the prevailing problems and gaps such as instability, shortage and power interruption, high labor turnover by setting minimum wage rate at the national level. It is also suggested that the federal government should work closely with the regional governments and other concerned bodies in creating the local community to ensure peace and stability and enhance the effective and efficient operation of the specialized industrial park.

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