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Background Paper

**The Internal Conflicts in Ethiopia between 2020 and 2022:
Humanitarian, Social, Economic, and Political Costs, and Regional
Ramifications¹**

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List of Abbreviations

ACHPR	African Commission on Human and Peoples' Rights
AMISOM	African Union Mission to Somalia
AU	African Union
CSOs	Civil society organisations
DTM	Displacement Tracking Matrix
EDF	Eritrean Defense Force
EHRC	Ethiopian Human Rights Commission
ELM	Eritrean Liberation Movement
ENDF	Ethiopian National Defense Force
EPRDF	Ethiopian People's Revolutionary Democratic Front
GERD	Great Ethiopia Renaissance Dam
GLF	Gambela Liberation Front
ICHREE	International Commission of Human Rights Experts on Ethiopia
IDMC	Internal Displacement Monitoring Center
IDPs	Internally displaced persons
IGAD	Intergovernmental Authority on Development
IMF	International Monetary Fund
IOM	International Organization of Migration
METEC	Metals and Engineering Corporation
MSF	Médecins Sans Frontières
NDVI	Normalised Difference Vegetation Index
OCHA	Office for the Coordination of Humanitarian Affairs
OFC	Oromo Federalist Congress
OLA	Oromo Liberation Army
OLF	Oromo Liberation Front
ONLF	Ogaden National Liberation Front
PP	Prosperity Party
TPLF	Tigray People's Liberation Front
UAE	United Arab Emirates
UNICEF	United Nations International Children's Emergency Fund

Executive Summary

The internal conflicts in Ethiopia between 2020 and 2022 have undone the considerable progress that has been made in Ethiopia's economic and social development over the last few decades. After the political transition of 2018, the new government of Prime Minister Abiy Ahmed was widely praised for enabling a stronger political opposition, including by releasing political prisoners from detention, and for signing a peace agreement with Eritrea after a two-decades-long stalemate. Ultimately, however, the subsequent handling of the transition by the different players in the erstwhile coalition of power ended in its collapse and a deep conflict in Tigray and beyond.

This paper reviews the extensive costs in the short and long term to Ethiopia of the internal conflicts and regional tension, including (but also looking beyond) the conflict in Tigray. Its purpose is not on allocating blame, but factually reporting costs, broadly defined, as a means of identifying the counterfactual: namely, a sustained peace and recovery.

The rising human cost of conflict has been widely reported, even if finding reliable data on the full scale of that cost remains difficult. The war in Tigray, insurgency movements, and communal violence in Oromia and other regions of Ethiopia have killed, wounded, and displaced several hundreds of thousands of people. The apparent use of sexual violence as a weapon of war, and severe acute malnutrition of over a million children, stand in stark contrast with previous gains in women's rights and socio-economic development. Basic services like health care and education have been destroyed or disrupted, and not just in Tigray. Even without a full resolution of the conflicts, peace can reduce this human suffering.

Economic costs are significant and will undermine development for years to come. Comparing current growth forecasts by the International Monetary Fund (IMF) and our forecasts in a counterfactual scenario without the internal conflicts, we estimate that by 2027 the cumulative losses to the Ethiopian economy since the start of the conflict will reach approximately 125 billion current US dollars, which will make the economy 19 percent smaller than it would have been without the conflict by 2027. This is equivalent to the amount of money required to ensure immediately that 10 million rural Ethiopians or all urban poor are out of poverty for the next four years, and represents a setback in real economic growth of about five and a half years. This relative decline is a result of the reduction in economic activity due to the conflict, severe macroeconomic instability, and the inability to attract private and public inflows of capital. The ability to achieve Prime Minister Abiy's ambitions for poverty reduction, a modern economy, and middle-income status has thus been undermined. Access to financial stabilisation resources from multilateral lenders, such as the IMF, is also now difficult. There are risks that these economic factors will fuel more tensions; societal and security stabilisation will also require economic stabilisation.

The state's monopoly on the legitimate use of violence has been greatly undermined, which in turn is undermining the government's ability to stabilise security in the country. Privatisation and decentralisation of the means of violence have emboldened non-state security actors. Tensions and conflict between the security forces of regional states have also increased. The diversion of resources, priorities, and attention of the state to the war mobilisation and counter-insurgency efforts is affecting the delivery and quality of services in areas that are not directly affected by the conflicts. This has weakened the state's ability to ensure the provision of security

as a basic public good. Stabilisation will require steps to rebuild this public good provision in terms of security.

Social capital is in decline, and societal routes towards conflict resolution have been critically harmed. All indications are that the underlying fabric of society has been badly affected. The numerous conflicts have damaged communal relations, the social fabric, and cultural norms, in turn widening differences, and weakening religious, communal and traditional mechanisms for conflict resolution and peace building. Social cohesion will take considerable time and effort to recover, which will continue to affect the functioning of society.

Progress on democratisation, accountability, and human rights has stalled, and may have been reversed. The conflict has polarised and fragmented society and institutions, and has been used to justify a crackdown on human rights and civil liberties, including in the form of extrajudicial killings and illegal mass detentions. Previous efforts to democratise the state and liberalise the political space have been reversed and the state has suppressed dissenting voices in the opposition, the civil society, and the press. The role of the military and the security services in political and public lives has increased, undermining civilian oversight and democratic accountability of the security forces. Whether this can be reversed is not self-evident: it will be essential to balance Ethiopia's quest for stability with reinstating democratic and accountability processes.

Fundamental questions about the nature of Ethiopia, and the state, never absent throughout the country's history, have been raised dramatically, but there is as yet little scope for resolving these questions. The conflicts have disrupted aspirations and initiatives for inclusive, comprehensive, and independent processes to discuss and debate the highly-contested issues of citizenship, history, and identity, and to reach a consensus on a governance model and organisational principle for the Ethiopian state. The conflicts have affected state cohesion and state–society relations, and have weakened the features of the Ethiopian state that have brought relative stability, growth, and development in the past decades. To bring about longer-term stability, steps will need to be taken to drive constructive debate and potential reconciliation of opposing views.

The conflicts have harmed Ethiopia's relations with neighbouring states, multilateral institutions, and international security and development partners, undermining Ethiopia's standing as a trusted regional partner. Violence and serious accusations of war crimes and ethnic cleansing have negatively affected the image, reputation, and relations of the Ethiopian state and have compromised its participation and position in multilateral organisations. The conflicts and Ethiopia's subsequent disagreements with neighbouring states have also compromised Ethiopia's regional role and cooperation. The apparent dependence on Eritrea has made this worse. The war in Tigray and Ethiopia's continued military cooperation with Eritrea have consolidated Eritrea's influence in political and security spaces in Ethiopia and the wider Horn of Africa. With a peace deal now reached, Eritrea's role cannot be ignored, especially in regard to achieving a solution for Western Tigray and implementing an effective security sector reform strategy.

Introduction

Ethiopia has seen considerable progress in economic and social development over the past decades (up until COVID-19 hit). In the period from 2003 to 2019, Ethiopia’s economy grew at rates of 8 percent to 10 percent per annum in all but one year (2018, 6.8 percent) – one of the fastest growth rates in sub-Saharan Africa and indeed in the rest of the world. This growth, driven in part by an increasing opening of the economy to foreign direct investment, large-scale public infrastructure investment, and strong investments in rural development, poverty reduction, and human capital, led to significant improvements in living standards. GDP per capita more than tripled, from US\$ 259 in 2003 to US\$ 827 in 2020.² The percentage of the population living below the government’s national poverty line fell significantly from 45.5 percent in 1995 to 23.5 percent in 2015.^{3,4} The under-five mortality rate, a widely-used indicator of overall child health and a proxy for broader social and economic development, decreased from one in five children born alive dying before the age of five in 1990 to one in 20 children dying before the age of five in 2020.⁵

In regional politics, Ethiopia became a reliable peace, security, and development partner. It took a leading role in the establishment of the Intergovernmental Authority on Development (IGAD), a multilateral development organisation in Eastern Africa, and in the African Union (AU), which has its administrative headquarters in Ethiopia’s capital Addis Ababa. Ethiopia similarly took on leadership roles in peace and political processes in Sudan, South Sudan, and Somalia.

The political transition of 2018 was well received amongst international partners, not least in the West. The government of the new Prime Minister, Abiy Ahmed, was widely praised for enabling a stronger political opposition, including by releasing political prisoners from detention, for restoring relations with Eritrea after decades of conflict and stalemate, and for taking steps towards more democratisation, press freedom, and accountability. International recognition culminated in the 2019 Nobel Peace Prize being awarded to Prime Minister Abiy Ahmed “for his efforts to achieve peace and international cooperation, and in particular for his decisive initiative to resolve the border conflict with neighbouring Eritrea”, but also with the hope of “[strengthening] his important work for peace and reconciliation”.⁶

Ultimately, however, the subsequent handling of the transition by the different players in the erstwhile coalition of power ended in its collapse and a deep conflict in Tigray and beyond. The initial praise and optimism did not reflect the continuing tensions and instability in the country.

² GDP per capita in constant 2015 US\$, based on the World Bank World’s Development Indicators database (available at <https://data.worldbank.org/indicator/NY.GDP.PCAP.KD?locations=ET>).

³ Poverty headcount ratio at the national poverty line based on the World Bank’s World Development Indicators database (available at <https://data.worldbank.org/indicator/SI.POV.NAHC?locations=ET>). Note that the national poverty headcount ratio is different from the poverty headcount ratio based on global poverty lines, which are set by World Bank staff based on typical national poverty lines of low-income countries. For more information on poverty in Ethiopia, also see <https://pip.worldbank.org/country-profiles/ETH>.

⁴ World Bank Poverty & Equity Brief for Ethiopia (October 2022), available at https://databank.worldbank.org/data/download/poverty/987B9C90-CB9F-4D93-AE8C-750588BF00QA/current/Global_POVEQ_ETH.pdf.

⁵ Under-five mortality rate, deaths per 1,000 live births, based on data from the United Nations Inter-agency Group for Child Mortality Estimation (available at <https://childmortality.org/data/Ethiopia>).

⁶ Official press release on the Nobel Peace Prize for 2019, available at <https://www.nobelprize.org/prizes/peace/2019/press-release/>

Indeed, full stability was never restored after the at times violent protests throughout the decade of the 2010s. The path towards genuine openness and reconciliation was never clear and straightforward, as the new government consolidated its power. The Ethiopian People's Republican Democratic Front (EPRDF), the coalition that had taken control of Ethiopia in 1991, had elected Abiy Ahmed as its chairman in 2018, but against the wishes of its erstwhile most powerful coalition partner, the Tigrayan People's Liberation Front (TPLF). The EPRDF disintegrated and was dissolved, and all coalition partners but the TPLF in 2019 merged into the Prosperity Party, isolating the TPLF politically. Prime Minister Abiy Ahmed and his political partners then pushed for further rebalancing of power in the military, the state and the economy, away from the hold TPLF had for decades.

In November 2020, these tensions escalated and spilled out into the open with the beginning of the Tigray war, leading to the most devastating conflict Ethiopia and the Horn of Africa have witnessed in recent decades. The war brought in Eritrea and spread to the Amhara and Afar regional states within Ethiopia. At the same time, the intensity, reach, and impact of the insurgency in the Oromia region grew over the next two years, destabilising the biggest and most populous region in Ethiopia. Rebel activities and communal clashes in Benishangul-Gumuz and Gambella regions led to killings and population displacement, military interventions, and accusations of gross human rights violations. The boundary conflict between the Afar and Somali regions also resulted in casualties and growing tension in the wider Horn of Africa area.

The costs of the conflicts in Tigray and beyond continue to rise. Beyond the immediate human cost, the various interlinked conflicts have undermined the fabric of Ethiopia's society, the state's monopoly on power, the macroeconomic situation of the country, the push for democratisation and expanded human rights, and, in fact, the very nature of the state. Beyond Ethiopia, the conflicts have also fueled regional tensions and undermined the country's international standing.

This paper reviews the extensive short- and long-term costs to Ethiopia of the internal conflicts and regional tension, including (but also looking beyond) the conflict in Tigray. Its goal is not to allocate blame, but to report factually and transparently the increasing costs, and to highlight the widening disconnect between Ethiopia's recent progress in economic, social, and political development, and the current situation. We hope that this can serve to identify and illustrate the counterfactual: namely, the benefits of restoring peace and stability and focusing on recovery and reconstruction in Ethiopia and the broader region.

The paper begins with a review of the political origins of the conflicts. We then assess the implications of the conflict in various domains. We begin with the immediate costs in terms of human, social, and physical capital. We then discuss broader implications for Ethiopia's macroeconomic situation. It may have been tempting to stop here, but the conflict in Tigray as well as the other conflicts across the country have had further costs and implications as well. We therefore continue with a discussion of internal security, governance, accountability, human rights, and the nature of the Ethiopian state. Finally, we turn to the regional and international implications. We conclude by emphasising the multifaceted nature of the conflicts.

The Political Origins of the Conflict in Tigray

The Ethiopian People's Revolutionary Democratic Front (EPRDF) (1988-2019) was a coalition of rebel groups that fought the Derg, the military regime led by Mengistu Haile Mariam that had toppled the Ethiopian Empire in 1974. The Tigray People's Liberation Front (TPLF), with its advanced military, political, and organisational capabilities, led the EPRDF coalition in overthrowing the Derg regime and ending the long and violent Ethiopian Civil War in 1991. This pivotal role in the insurgency against the Derg led to a political settlement in the post-Civil War period that favoured the TPLF. Despite representing only about 6 percent of the population, the TPLF's power in the EPRDF equaled or outweighed that of the Oromo and Amhara groups within the coalition, even though the Oromo and Amhara ethnic groups represent more than two-thirds of the population. Tigrayan military and security officers dominated the top leadership of the Ethiopian National Defense Forces (ENDF) and the National Intelligence and Security Services (NISS) for most of the last three decades (1991-2019).

The rule of the EPRDF was characterised by highly centralised political and economic decision-making, despite the wide-ranging political, economic, and social rights the constitution pledged to the regional states and Ethiopia's multiple ethnic, cultural, and political groups. Political opposition, the free press, and the civil society were limited by restrictive and repressive legislation that narrowed the public and political spaces. Politically-motivated harassment, imprisonment, and killings were not uncommon. The state and party infrastructure that was used to mobilise the population and bring economic growth and development, was also used to surveil, suppress, and crush dissent.

The 2005 elections, arguably the most contested polls under the EPRDF's rule, exposed numerous ideological contradictions and faultlines within the EPRDF, the state and society. The election results were followed by a period which saw violence, crackdowns, and imprisonment of the opposition and press. Subsequent years saw a number of political, economic, and legislative measures put in place to further expand the power of the state, limit the civic space, and refine the party apparatus.

The delivery of development outcomes became the cornerstone of the state and of the government's legitimacy. The period after 2005 saw the expansion of basic services, higher education, and urbanisation, and improved infrastructure. The distribution of the gains was increasingly contested as some regions and groups claimed underdevelopment and marginalisation. The emergence of a new economic elite close to the EPRDF further exacerbated these grievances. Prime Minister Meles Zenawi, in power from 1995 until he died in office in 2012, was the chief author, ideologue, and operator of this political and economic system. Meles played the role of arbiter between the various ethnic and political elites and their constituencies, and also provided civilian oversight and control over the security forces. His death left a power and ideological vacuum within the party and the state. The years following his death saw a chaotic decentralisation of political and economic decision-making. Tensions between the member parties of the EPRDF, differences between the federal and regional governments, and standoffs between federal and regional security institutions characterised the period from 2015 to 2018. With the establishment of the Metals and Engineering Corporation (METEC) under the ENDF, the Tigrayan-dominated Ethiopian military leadership became a major political and economic player

in post-2012 Ethiopia, undermining the long-established norms of civil–military relations under the EPRDF. Accusations of corruption and mismanagement by the METEC in multi-billion birr infrastructure projects, including the Great Ethiopia Renaissance Dam (GERD), sugar and automobile assembly plants, and a transformer factory, further added to the grievances. METEC embodied the economic, political, and security imbalance within the EPRDF and the Ethiopian state, and contributed to the unravelling of the elite pact.

The appointment of Hailemariam Desalegn, Meles’ protégé and a former university professor from Wolayta, a minority ethnic group from the south of the country, as Prime Minister in September 2012 was seen as a compromise reached between the various factions under the EPRDF, designed to ease competition and tension within the ruling EPRDF coalition. The mistrust and heightened competition within the EPRDF resulted in a new arrangement, with three deputy prime ministers being appointed, hailing from three different groups that had been part of the establishment of the EPRDF in the 1980s: the TPLF, the Oromo People’s Democratic Party (OPDO) and the Amhara National Democratic Movement (ANDM). This era witnessed a decline in the observance of the guiding ideology of the party – revolutionary democracy – and its operational principle of democratic centralism. Member parties started to exercise autonomy, and federal regional states undermined and defied norms and directions from Addis Ababa. Cohesion and cooperation between federal and regional security forces was weakened, at times resulting in violent confrontations. The start of the rights movement by the Ethiopian Muslims (2012-2014), and protests in Oromia (2015–2018) and Amhara (2016–2018) regions shook the foundation of the state.

The scale, persistence, geographic coverage, and elite support for these protests undermined the legitimacy of the federal, regional, and local governments. Attempts to crush the protest movements through force gave further impetus and a feeling of legitimacy to the movements, and won them sympathy and support within the top leadership of the OPDO and ANDM, and within the bureaucracy, security institutions, and political leadership of Oromia and Amhara regional states. At the peak of the protests in 2017, the federal government’s control over Oromia and Amhara regions was minimal, forcing PM Hailemariam Dessalegn to resign in February 2018. The inability of the EPRDF structure to deal with the crisis resulted in the election of Abiy Ahmed, then chairperson of the OPDO, as chairperson of the EPRDF and the new Prime Minister of Ethiopia.

The TPLF was strongly opposed to Abiy’s rise to power, but was outvoted by other members of the EPRDF. Tensions between the TPLF-affiliated elites and Abiy started from the very start of his leadership. Abiy’s criticism of the 27 year rule of the EPRDF and his characterisation of the period as a ‘dark period’ heightened the debates on the legacy of the TPLF dominated EPRDF. The TPLF portrayed the period as a time of stability and development, while the new leadership under Abiy emphasised the repression, corruption, and domination of the TPLF. Numerous high-level Tigrayan officials and officers were purged from the party, government, military, and intelligence institutions. An anti-corruption campaign focusing on the leadership of METEC and the business elite, and attempts to ensure accountability for senior security and intelligence officials accused of gross human rights violations, were portrayed by the TPLF as a campaign that disproportionately targeted Tigrayans with the objective of humiliating and marginalising them. The federal government consistently accused TPLF operatives of sabotaging the government, supporting armed movements, and attempting to derail the transition to Abiy’s leadership. Abiy

also questioned the ideological and historical foundations of the constitution, the federal system, revolutionary democracy, and the developmental state model.

Differences in understandings of the constitution and federalism created nervousness in Mekele, the capital city of Tigray, about self-rule and autonomy, starting debates on the future of a Tigrayan nation within the Ethiopian state. Improved relations between Abiy Ahmed and Issayas Afeworki, the President of Eritrea, who publicly called for the end of the TPLF, further widened the mistrust and tension between Addis and Mekele. Territorial demands by Amhara nationalists, who claimed one-third of Tigray (which had been annexed by the TPLF in 1991), as Amhara ancestral land, and calls for the forceful takeover of the areas by some nationalist groups, led to the increasing military buildup of the Tigray and Amhara regional security forces and exacerbated skirmishes along the boundaries of the two regions. The 2019 transformation of the EPRDF into a new party, the Prosperity Party (PP), was rejected by the TPLF. The end of the EPRDF and rejection of the TPLF to join the new party dismantled the space for shared dialogue and interaction between the TPLF and other former members of the EPRDF.

The tensions between the federal government and the regional government of Tigray reached a new high in 2020 with the decision by the federal government to postpone the national elections, originally scheduled for May 2020, citing the COVID-19 pandemic. Mekele labelled the decision unconstitutional and declared that the federal government as an administration had no constitutional, electoral, or popular legitimacy. Following the rejection by the National Election Board of Ethiopia's (NEBE) of Mekele's request to hold its regional election as scheduled, the Tigray regional government created its own electoral body, held elections, and created a new government. The institution, the process, and the new government were labelled illegal by Addis Ababa. The mutual delegitimation, increasing accusations of preparations to start a war, and the absence of any shared political and governance platforms for dialogue led to the start of war on 3 November 2020. The Tigray regional government launched a 'pre-emptive' attack on the ENDF Northern Command site in Mekele, claiming the ENDF, the Eritrean army, and the Amhara regional security forces were preparing to launch an attack on Tigray.

Assessing the Implications of the Internal Conflicts

Human Costs and Destruction of Physical Capital and Infrastructure

This section focuses on the most immediate costs that the internal conflicts in Ethiopia between 2020 and 2022 have imposed on the country: death, injury, and displacement that have led to the destruction of both *human capital* as well as the destruction of *physical capital* and infrastructure.

A Primer on Conflict Statistics

Before we begin, it is important to note that accurately assessing the casualties of a conflict is an extremely complex process that goes significantly beyond the scope of this paper. In any conflict, obtaining statistics that are reliable and comparable across time and space is typically very difficult.⁷ First, different actors may choose to strategically distort or conceal figures. Second, information is often genuinely difficult to obtain in ongoing conflicts because administrative data collection may break down and the implementation of cross-sectional surveys may not be feasible. Third, figures can differ dramatically because of different underlying concepts, definitions, or criteria relating to what should be included. Finally, it is important to differentiate between anecdotal reports and more comprehensive efforts at systematically recording and estimating total numbers of affected individuals. For reported figures on the conflicts in Ethiopia and elsewhere, it is thus important to carefully examine underlying methodologies and definitional boundaries.

In general, there are at least three key dimensions on which data on conflict casualties can differ:

1. Casualties vs. deaths

The concept of a ‘casualty’ is typically broader than that of ‘deaths’ or ‘fatalities’ and may include individuals that are not fatally injured. The Oxford English Dictionary defines a casualty as an ‘individual killed, wounded, or injured’.⁸ In some news reports, the word ‘casualties’ is sometimes used synonymously with ‘deaths’.

2. *Civilian vs. non-civilian* casualties or deaths

At a superficial level, a ‘civilian’ is simply anyone who does not belong to the armed forces involved in a conflict.⁹ This definition immediately becomes difficult and ambiguous in the context of civil wars, communal clashes, and insurgencies. Second, the concept of *civilian casualties* in the sense of ‘wounded or injured’, as in the dictionary definition above, opens this definition up to a larger group of potential victims: victims of sexual violence, internally displaced persons (IDPs), and those injured or dying due to indirect effects of the war, such as malnutrition (see next point).

⁷ cf. Adam Roberts (2010) ‘Lives and Statistics: Are 90% of War Victims Civilians?’ *Survival*, 52(3), 115-136, DOI: 10.1080/00396338.2010.494880; and Milton Leitenberg (2006) ‘Death in Wars and Conflicts in the 20th Century’. Occasional Paper 29, Ithaca, NY: Cornell University Peace Studies Program.

⁸ ‘casualty, n.’ *Oxford English Dictionary Online*, Oxford University Press, September 2022 (available at <https://www.oed.com/view/Entry/28636>).

⁹ cf. 1949 Geneva Convention IV, Article 4, and the 1977 Geneva Protocol I, Article 50.

3. *Direct vs. indirect* casualties or deaths

Beyond the violence that directly causes casualties or deaths (e.g. through weapons), conflicts typically lead to a large number of indirect casualties or deaths. The scope of the term direct casualty vs. the term indirect casualty or death can vary widely across definitions. The United Nations Office of the High Commissioner for Human Rights defines direct killings or injuries as those that may be caused by weapons or other means and methods (for example, starvation tactics). Indirect killings or injuries are those that result from a loss of access to essential goods and services that are aggravated by the situation of an armed conflict.¹⁰

With these concepts and definitions in mind, we can examine the reported human costs of the ongoing conflicts in Ethiopia.

Estimates of Total Casualties or Deaths

Given the lack of access to conflict areas (including the lack of telecommunications networks) and the absence of independent research institutions in Ethiopia with the capacity to undertake comprehensive assessments of casualties, there are currently no reliable estimates of the total number of casualties or deaths in the Tigray conflict or other internal conflicts within Ethiopia.¹¹ Similarly, total casualty figures from other conflicts across the country are not well documented and are contested by different political groups.

Direct Impacts and Human Rights Violations

The lack of reliable and comprehensive estimates of total casualties should not distract from the fact that the civil war in Tigray and the other conflicts around the country have had a significant human cost, with numerous credible reports of human rights violations on all sides. The prevalence of sexual violence and the use of torture, rape, and sexual violence as methods of warfare is particularly notable. A non-exhaustive list of relevant reports is given below:

- In December 2020, United Nations High Commissioner for Human Rights, Michelle Bachelet, said that her office had corroborated reports of artillery strikes on populated areas, the deliberate targeting of civilians, extrajudicial killings, and widespread looting during fighting in central and southern Tigray. She also pointed to the alleged killing of

¹⁰ cf. United Nations Office of the High Commissioner for Human Rights (2019) ‘Guidance on Casualty Recording’. New York: United Nations, p. 19 (available at https://www.ohchr.org/sites/default/files/Documents/Publications/Guidance_on_Casualty_Recording.pdf).

¹¹ This includes widely cited numbers of half a million deaths by Professor Jan Nyssen at Ghent University in Belgium (<https://critreahub.org/tigray-mortality-has-war-and-hunger-cost-500000-lives-professor-jan-nyssen-ghent-university>) and other numbers used by journalists with limited clarity of sources, see e.g. <https://martinplaut.com/2022/10/19/new-estimate-of-the-tigray-death-toll/>. However, we could find no description of the methodology or underlying data sources for these estimates. Especially estimated deaths from hunger and health care are problematic, and based on unspecified extrapolation from UN figures on the number of people in IPC 5 (‘in famine conditions’) at various stages of the conflict, and the expected death rates from this. The Ghent teams own publication “Tigray: Atlas of the Humanitarian Situation”, (unlike their quoted statements in the press) is far more cautious and careful, and could be the basis of further critical assessment (see eg. p.73 on food security mortality). See <https://www.ethiopiaticrises.com/docs/TigrayAtlasOfTheHumanitarianSituation.pdf>.

several hundred people, mainly Amharans, in the Western Tigray town of Mai Kadra, and to multiple reports that the Amhara ‘Fano’ militia had committed human rights abuses, including killing civilians and looting.¹²

- A 24 March 2021 report by the Ethiopian state human rights body, Ethiopian Human Rights Commission (EHRC) concluded that grave human rights violations and the killing of an unknown number of civilians had been committed in Axum, Tigray, by Eritrean soldiers. The report documented the loss of lives, bodily and mental injuries, instances of gender-based violence, looting and other human rights violations in Tigray. The report, which followed an investigation by the EHRC in Tigray, spoke with 45 families of victims, eye witnesses, and focus group discussions, and also drew on photographic and video evidence. The EHRC also highlighted investigations of accusations of grave violations committed by some members of the ENDF¹³.
- In August 2021, the United Nations International Children's Emergency Fund's (UNICEF's) Executive Director, Henrietta Fore, said that UNICEF was ‘alarmed by the reported killing of over 200 people, including more than 100 children, in attacks on displaced families sheltering at a health facility and a school in Afar region on Thursday’.¹⁴
- In August 2021, international NGO and advocacy group Amnesty International released a report documenting widespread cases of sexual violence and rape being practised against ethnic Tigrayan women and girls. Using interviews with internally and internationally displaced women and girls from Tigray, the report documented instances of gang rape, sexual slavery, sadistic brutality, beatings, insults, threats, humiliation, and sexual assault while they were fleeing the country. The report alleged that the perpetrators included members of the Eritrean Defense Force (EDF), the ENDF, the Amhara Regional Police Special Forces (ASF), and the Amhara Fano militia.¹⁵
- In February 2022, international NGO Amnesty International released a report describing killings of civilians, gang rape, and the destruction of property by TPLF forces in and around the two towns of Chenna and Kobo in northern Amhara.¹⁶

¹² United Nations News (2020) ‘Tigray: Hundreds of civilians reported killed in artillery strikes, warns UN rights chief’ (available at <https://news.un.org/en/story/2020/12/1080622>) and UN Office of the High Commissioner for Human Rights Press Release, ‘Exceedingly worrying and volatile situation in Ethiopia – Bachelet’ (available at <https://www.ohchr.org/en/press-releases/2020/12/exceedingly-worrying-and-volatile-situation-ethiopia-bachelet>).

¹³ EHRC, ‘Investigation into Grave Human Rights Violations in Aksum – Preliminary Findings’.
<https://ehrc.org/investigation-into-grave-human-rights-violations-in-aksum-city-report-on-preliminary-findings/>

¹⁴ UNICEF (2021) ‘Press release: Statement by UNICEF Executive Director Henrietta Fore on reported killing of hundreds of civilians, including children, in Afar, northern Ethiopia’ (available at <https://www.unicef.org/press-releases/statement-unicef-executive-director-henrietta-fore-reported-killing-hundreds>)

¹⁵ Amnesty International (2021) ‘Ethiopia: “I don’t know if they realized I was a person”’: Rape and sexual violence in the conflict in Tigray, Ethiopia’, Report AFR 25/4569/21 (available at <https://www.amnesty.org/en/documents/afr25/4569/2021/en/>).

¹⁶ Amnesty International (2022) ‘Ethiopia: Summary killings, rape and looting by Tigrayan forces in Amhara’, Report AFR 25/5218/2022 (available at <https://www.amnesty.org/en/latest/news/2022/02/ethiopia-tigrayan-forces-murder-rape-and-pillage-in-attacks-on-civilians-in-amhara-towns/>)

- In April 2022, international NGOs and advocacy groups Human Rights Watch and Amnesty International jointly published a report on what they described as a brutal ethnic cleansing and forced displacement campaign carried out against ethnic Tigrayans across Western Tigray by the interim administration of the area, Amhara militias, and Ethiopian troops.¹⁷
- In June 2022, the chair of the International Commission of Human Rights Experts on Ethiopia (ICHREE) briefed the United Nations Human Council on an alleged massacre of at least 200 people in Western Oromia.¹⁸
- In September 2022, the ICHREE released its initial report – arguably the most comprehensive description of human rights violations in the Tigray conflict to date. The ICHREE was established by members of the United Nations Human Rights Council with a mandate that includes ‘conduct[ing] a thorough and impartial investigation into allegations of violations and abuses of international human rights law and violations of international humanitarian law and international refugee law in Ethiopia committed since 3 November 2020 by all parties to the conflict, including the possible gender dimensions of such violations and abuses, by building upon the report of the Office of the High Commissioner and the Ethiopian Human Rights Commission’.¹⁹

The report concluded that ‘there are reasonable grounds to believe that violations, such as extrajudicial killings, rape, sexual violence, and starvation of the civilian population as a method of warfare have been committed’. The report included detailed findings on the shelling of Mekele, killings in Kobo and Chenna, and a drone strike on an IDP camp in Dedebit. It also concluded that “[t]he Commission finds reasonable grounds to believe that the ENDF, EDF, and Fano have committed widespread acts of rape and sexual violence against Tigrayan women and girls. In some instances, the attackers expressed an intent to render the victims infertile and used dehumanising language that suggested an intent to destroy the Tigrayan ethnicity. Tigrayan Forces have also committed acts of rape and sexual violence, albeit on a smaller scale.” The report stated that the Commission had “reasonable grounds to believe that the denial and obstruction of humanitarian access to Tigray Region by the Federal Government and allied regional State governments was committed for the purpose of depriving the Tigrayan population of objects indispensable for its survival, including food and healthcare”, and that “[t]he acts thereby violate the prohibition against the use of starvation of the civilian population as a method of warfare”.

Finally, the report indicated several areas that needed further investigation, including large-scale killings in Tigray and in Oromia, indiscriminate attacks and killings of civilians in

¹⁷ Human Rights Watch and Amnesty International (2022) “‘We Will Erase You from This Land’ Crimes Against Humanity and Ethnic Cleansing in Ethiopia’s Western Tigray Zone’ (available at <https://www.hrw.org/report/2022/04/06/we-will-erase-you-land/crimes-against-humanity-and-ethnic-cleansing-ethiopia>)

¹⁸ United Nations News (2022) ‘Ethiopia still in grip of spreading violence, hate speech and aid crisis’ (available at <https://news.un.org/en/story/2022/06/1121772>).

¹⁹ United Nations General Assembly, Human Rights Council. (2021) Resolution S-33/1 adopted by the Human Rights Council on 17 December 2021, ‘Situation of human rights in Ethiopia’ A/HRC/RES/S-33/1 (available at <https://digitallibrary.un.org/record/3954203?ln=en>).

Afar, arbitrary detention of Tigrayans across the country, human rights violations and abuses against Eritrean refugees, and civilian casualties during airstrikes.²⁰

From the many pieces of anecdotal evidence compiled by international actors and the ICHREE report, it appears clear that all sides of the conflicts have been responsible for severe human rights violations that may, in some instances, amount to crimes against humanity.²¹

Indirect Impacts: Internal Displacement

The most clearly measurable indirect impact of the conflicts on people in Ethiopia's conflict-affected areas is displacement. The United Nations defines IDPs as 'persons or groups of persons who have been forced or obliged to flee or to leave their homes or places of habitual residence, in particular as a result of or in order to avoid the effects of armed conflict, situations of generalised violence, violations of human rights or natural or human-made disasters, and who have not crossed an internationally recognized border'.²² Globally, conflict and violence are the most important drivers of internal displacement,²³ and the vast majority of IDPs are women and children, who are at heightened risk of human rights violations. Because IDPs are frequently at risk of physical attacks and sexual assault, and often lack appropriate shelter, they also tend to have higher rates of mortality than the general population.²⁴ Academic research from other contexts also suggests that

²⁰ United Nations General Assembly, Human Rights Council (2022) 'Report of the International Commission of Human Rights Experts on Ethiopia'. A/HRC/51/46 (available at <https://reliefweb.int/report/ethiopia/report-international-commission-human-rights-experts-ethiopia-ahrc5146-advance-unedited-version>).

²¹ The prohibition of crimes against humanity is considered a widely accepted and recognised norm by the international community. The concept and definition of 'crimes against humanity' within international law has evolved over time and through the jurisdictions of international courts such as the International Criminal Tribunal for the Former Yugoslavia and the International Criminal Tribunal for Rwanda (cf. <https://www.un.org/en/genocideprevention/crimes-against-humanity.shtml>). The 1998 Rome Statute that established the International Criminal Court defines crimes against humanity in Article 7 as 'any of the following acts when committed as part of a widespread or systematic attack directed against any civilian population, with knowledge of the attack: Murder; Extermination; Enslavement; Deportation or forcible transfer of population; Imprisonment or other severe deprivation of physical liberty in violation of fundamental rules of international law; Torture; Rape, sexual slavery, enforced prostitution, forced pregnancy, enforced sterilization, or any other form of sexual violence of comparable gravity; Persecution against any identifiable group or collectivity on political, racial, national, ethnic, cultural, religious, gender as defined in paragraph 3, or other grounds that are universally recognized as impermissible under international law, in connection with any act referred to in this paragraph or any crime within the jurisdiction of the Court; Enforced disappearance of persons; The crime of apartheid; Other inhumane acts of a similar character intentionally causing great suffering, or serious injury to body or to mental or physical health.'

²² United Nations Economic and Social Council (1998) 'Report of the Representative of the Secretary-General, Mr. Francis M. Deng, submitted pursuant to Commission resolution 1997/39, Addendum, Guiding Principles on Internal Displacement'. E/CN.4/1998/53/ADD.2 (available at <https://undocs.org/E/CN.4/1998/53/Add.2>).

²³ Measured by the global total number of IDPs as at the end of 2021, based on data from the Norwegian Refugee Council Internal Displacement Monitoring Centre's (IDMC's) Global Internal Displacement Database (available at <https://www.internal-displacement.org/database/displacement-data>).

²⁴ United Nations Office of the High Commissioner for Human Rights, Special Rapporteur on the Human Rights of Internally Displaced Persons (2022) 'About Internally Displaced Persons' (available at <https://www.ohchr.org/en/special-procedures/sr-internally-displaced-persons/about-internally-displaced-persons>).

internal displacement can lead to long-term unemployment, or eliminate labour force participation altogether.^{25,26,27}

Evidence points to a vast displacement and protection crisis that continues to unfold in and around Ethiopia's Tigray, Amhara, and Afar regions. One of the most important data sources on internal displacement dynamics is the United Nations International Organization of Migration's (IOM's) Displacement Tracking Matrix (DTM), which uses quarterly site assessments to track the number of IDPs, and quarterly village assessment surveys to track the number of IDPs returning to their communities. Importantly, this methodology relies on sites being accessible by IOM surveyors. As a result, the number of reported individuals is highly sensitive to the coverage of sites and to access limitations due to operational, security, or environmental factors. The IOM does not use extrapolation or statistical techniques to account for the inaccessibility of survey locations.

In its most recent Ethiopia National Displacement Report, covering the period from March to April 2022, the IOM DTM uses data from 2,158 covered sites, but it was unable to access 405 sites. In Tigray, all assessment sites were inaccessible; in Afar and Benishangul-Gumuz region access was severely limited. Keeping these caveats in mind, the IOM DTM reports 2.8 million displaced individuals nationwide, the vast majority of whom were displaced by conflict (65 percent), followed by drought (21 percent) and social tensions (5.5 percent).²⁸ In its previous National Displacement Report covering the period from December 2021 to February 2022, the IOM DTM was able to access sites in Tigray and registered 4.5 million IDPs, the largest share of whom were registered in Tigray (40 percent). As with the more recent DTM report, 81 percent of IDPs registered between December 2021 and February 2022 were displaced by conflict.²⁹ Because disaggregated data on the sex and age of IDPs was not collected at the beginning of the crisis in northern Ethiopia, the breakdown by sex and age in subsequently collected data is less reliable. The map below illustrates the IOM DTM displacement caseload in Ethiopia between December 2021 and February 2022, and highlights the areas that were not included in the assessment.

²⁵ Kondylis, F. (2008) 'Agricultural outputs and conflict displacement: evidence from a policy intervention in Rwanda', *Economic Development and Cultural Change*, 57(1), 31–66.

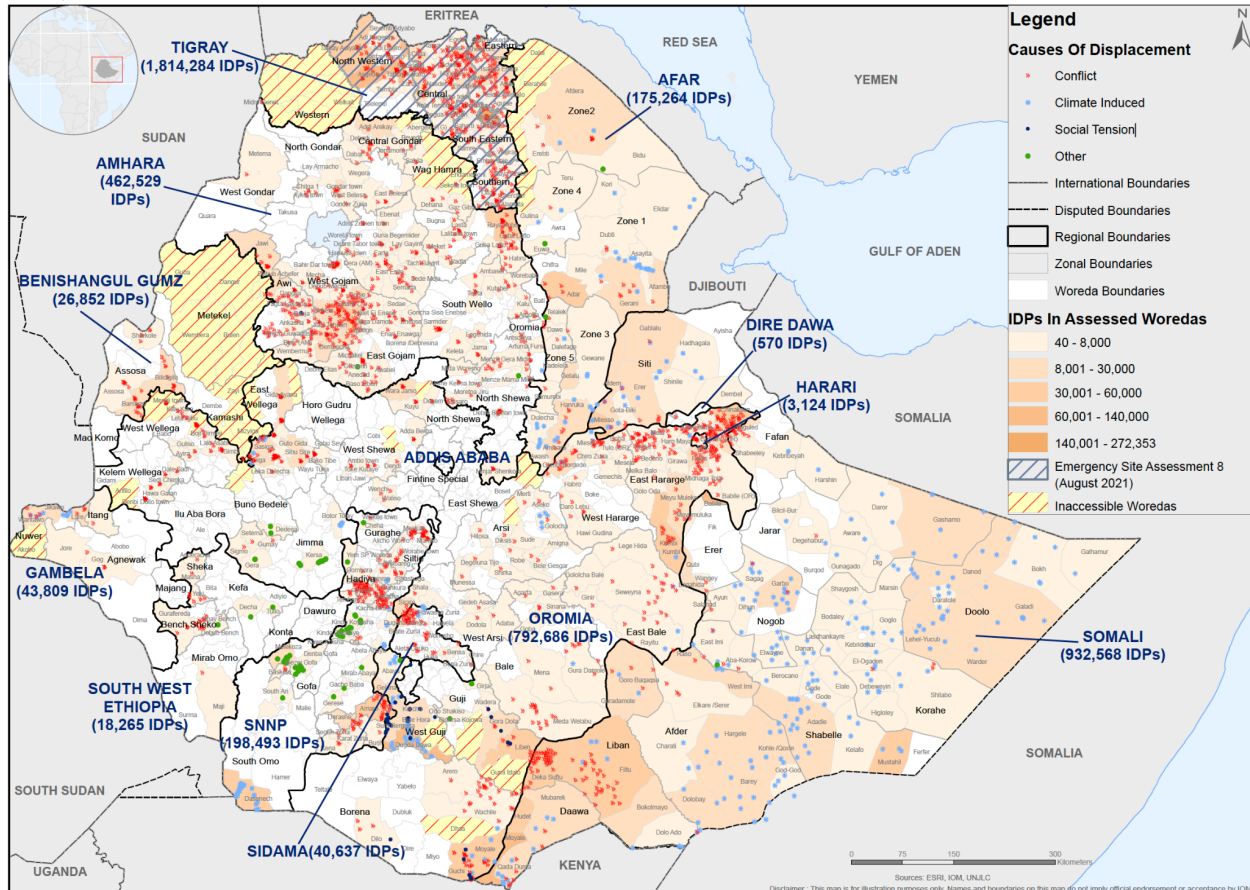
²⁶ Torosyan, K., Pignatti, N., and Obrizan, M. (2018) 'Job market outcomes of IDPs: The case of Georgia'. IZA Institute of Labor Economics, IZA DP No. 11301.

²⁷ Ivlevs, A., and Veliziotis, M. (2018) 'Beyond conflict: Long-term labour market integration of internally displaced persons in post-socialist countries'. *Journal of Vocational Behavior*, 105, 131–146.

²⁸ International Organization of Migration Displacement Tracking Matrix (2022) 'Ethiopia National Displacement Report 12 (March to April 2022)', IOM Special Liaison Office Ethiopia: Addis Ababa (available at <https://dtm.iom.int/reports/ethiopia-%E2%80%94-national-displacement-report-12-march-%E2%80%94-april-2022>).

²⁹ International Organization of Migration Displacement Tracking Matrix (2022) 'Ethiopia National Displacement Report 11 (December 2021 to February 2022)', IOM Special Liaison Office Ethiopia: Addis Ababa (available at <https://dtm.iom.int/reports/ethiopia-%E2%80%94-national-displacement-report-11-december-2021-%E2%80%94-february-2022>).

Figure 1: Map of displacement caseload and areas covered by IOM DTM (December 2021 to February 2022)



Source: IOM DTM (2022) 'Ethiopia National Displacement Report 11 (December 2021 to February 2022)', page. 4.

To account for the challenges in collecting internal displacement data, the Norwegian Refugee Council's Internal Displacement Monitoring Center (IDMC) uses a more complex, but also more comprehensive, monitoring methodology that builds on the IOM DTM and other data sources from government agencies, local authorities, the United Nations, international organisations, and other groups to construct estimates of total internal displacement.³⁰ The IDMC is highly transparent about its methodology, data sources, and caveats to its numbers, including in regard to assessing whether their figures likely represent over- or under-estimates.³¹ As a result, we believe that the IDMC figures represent the most comprehensive and reliable assessment of total internal displacement in Ethiopia.

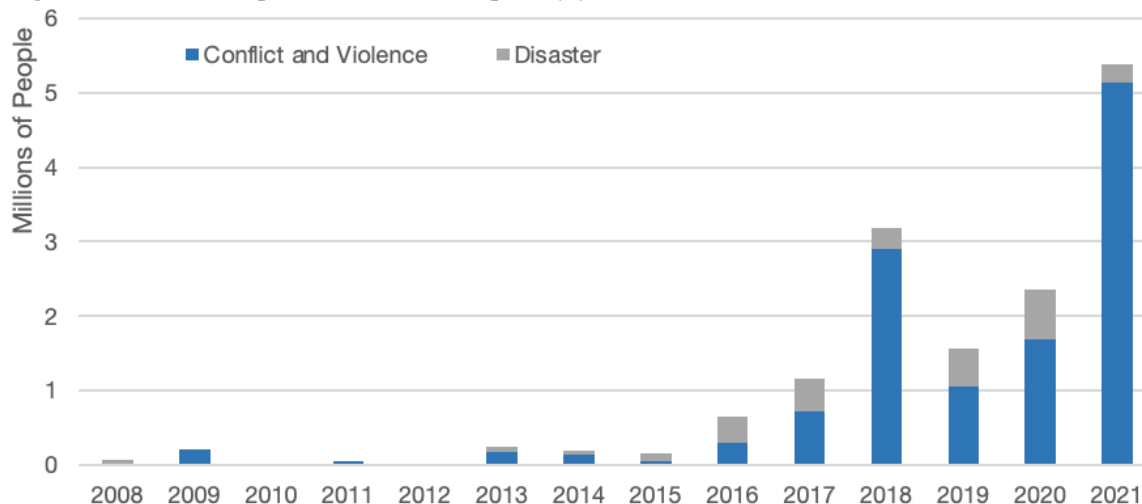
In its most recent assessment, as at May 2022, the IDMC reports that '[c]onflict and violence triggered more than 5.1 million new displacements in Ethiopia in 2021, three times the number in 2020 and the highest annual figure ever recorded for a single country'. This is in addition to internal displacement from disasters, mostly floods and drought, which triggered an additional 240,000

³⁰ cf. IDMC, 'How we Monitor' (available at <https://www.internal-displacement.org/monitoring-tools>).

³¹ cf. IDMC Figure Analysis 2021 for Ethiopia (available at <https://www.internal-displacement.org/sites/default/files/figures-analysis-2021-eth.pdf>).

internal displacements in 2021 – with the most significant event being the Belg season rains in April and May 2021.³²

Figure 2: Internal displacements in Ethiopia, by year and cause



Source: IDMC Displacement Database, available at <https://www.internal-displacement.org/database/displacement-data>

The extremely large number of IDPs represents a significant humanitarian, protection, and development challenge for the government and international development partners. Most immediately, IDPs need to be provided with material assistance, including water, sanitation, and hygiene (WASH) supplies, shelter, and basic services. The fluid security situation can make it difficult to provide this assistance. The widespread reports of sexual and gender-based violence in the ongoing conflicts illustrate the need for extensive prevention, risk mitigation, and response mechanisms for female IDPs. In the longer term, some IDPs may want to return to their original communities, while others may want to find jobs in their new host communities. Finding durable solutions for voluntary returns and for the settlement in new communities, while minimising social tensions between IDPs and hosts, will remain a major challenge for years to come.

³² IDMC Country Profile for Ethiopia, last updated 19 May 2022 (available at <https://www.internal-displacement.org/countries/ethiopia>).

Indirect Impacts: Humanitarian Needs, Poverty, and Social Development

In addition to the direct loss of human capital due to death, injury, and displacement outlined above, the conflicts across the country will likely increase poverty in affected regions, and likely represent a significant setback in terms of social development. Livelihoods have likely been similarly impacted, both for internally displaced populations and for host communities in affected areas. Overall, however, limited availability of data makes it difficult to precisely quantify the impact of the conflict on poverty and social development.

Ethiopia has made significant progress in poverty reduction over the past decades, thanks to rapid economic growth and job creation in urban areas, strong agricultural production, investments in infrastructure, and implementation of the country's flagship Productive Safety Net Programme (PSNP) in rural areas. The national poverty rate fell from 29.6 percent in 2011 to 23.5 percent in 2016. This reduction in the poverty headcount has been mirrored in non-monetary dimensions of welfare, such as increased ownership of household durable goods, such as mobile phones, improvements in housing quality, expansion of improved water sources and sanitation, dramatically expanded primary school enrollment, and significant reductions in child mortality. Notably, even the severe 2015/2016 El-Niño drought did not represent a major setback in poverty reduction, with marked decreases in the poverty headcount even in areas that experienced the highest rainfall shocks.³³

Estimates of poverty rates, household consumption expenditure, and non-monetary welfare indicators are typically based on large, representative household survey data that is collected through in-person or phone interviews. At the time of writing, such representative household survey data covering conflict-affected areas was not available. While this lack of data makes it difficult to accurately quantify the longer-term impacts of the conflicts on household welfare and social development, we can use data on immediate humanitarian needs in the areas of food security and nutrition to illustrate the scope and scale of impacts. It should be noted that data on humanitarian needs reflects multiple ongoing and overlapping man-made and natural crises across the country, including all types of conflict, but also drought and flooding. It is difficult to clearly delineate these different causes, so the data below should be read as an upper bound estimate of conflict impacts.

In September 2022, the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) Situation Report for Ethiopia, which compiles and summarises data on humanitarian needs from across various United Nations agencies and other sources, reported that more than 20 million people across Ethiopia are food insecure as a result of droughts in the southern, southeastern, and eastern parts of the country, violence in the northern and western parts, and generally high inflation. Across the country 1.2 million children face severe acute malnutrition (SAM) and 5.4 million children and pregnant and lactating women face moderate acute malnutrition (MAM).³⁴ Child and maternal nutrition are critically important for child and maternal

³³ World Bank (2020) 'Ethiopia Poverty Assessment: Harnessing Continued Growth for Accelerated Poverty Reduction' available at <https://documents.worldbank.org/en/publication/documents-reports/documentdetail/992661585805283077/ethiopia-poverty-assessment-harnessing-continued-growth-for-accelerated-poverty-reduction>.

³⁴ UN OCHA (2022) 'Ethiopia Situation Report, 19 September 2022' (available at <https://reliefweb.int/report/ethiopia/ethiopia-situation-report-19-sep-2022>).

health. Globally, malnutrition is directly or indirectly responsible for 35 percent of deaths among children under five.³⁵ An estimated 13 million people in Ethiopia needed emergency health assistance as at July 2022.³⁶

In northern Ethiopia more specifically, the latest available OCHA Situation Report from June 2022 estimates that more than 9 million people are in need of food assistance, throughout 2022. About 454,000 children are estimated to be malnourished, 116,000 of whom are severely malnourished. In addition, 120,000 pregnant and lactating women are estimated to be malnourished and 307,000 pregnant and lactating women need supplementary feeding. An estimated 3.9 million people in Tigray and more than 10 million people in Amhara need health services and interventions.³⁷

While it is difficult to extrapolate from humanitarian needs to longer-term impacts, the scope and scale of nutrition needs across the country suggest a setback in regard to the significant improvements in maternal and child health and the significant reduction in under-one and under-five mortality that Ethiopia has achieved over the past decades.³⁸

Basic Infrastructure and Civilian Property

Beyond the human cost, the conflicts have resulted in the destruction of civilian property and public infrastructure, which in turn have impacted the provision of basic services, including health and education.

Across Ethiopia's conflict areas, hospitals and healthcare facilities have been fully or partially destroyed, medicine supply chains disrupted, and payments for health staff stopped.³⁹ Limited fuel and medical supplies have particularly impacted health services in Tigray and Amhara regions.⁴⁰ There are indications that hospitals and healthcare facilities have been deliberately targeted in the Tigray conflict: of 106 health facilities in Tigray visited by Médecins Sans Frontières (MSF) teams during the first months of the conflict, about 70 percent had been looted and more than 30 percent had been damaged.⁴¹

³⁵ World Health Organization (2022) 'Severe Acute Malnutrition', Topics on Nutrition (available at https://apps.who.int/nutrition/topics/severe_malnutrition/en/index.html).

³⁶ UN OCHA (2022) 'Ethiopia Situation Report, 19 September 2022' (available at <https://reliefweb.int/report/ethiopia/ethiopia-situation-report-19-sep-2022>).

³⁷ UN OCHA (2022) 'Northern Ethiopia Situation Report, 16 June 2022' (available at <https://reliefweb.int/report/ethiopia/ethiopia-northern-ethiopia-humanitarian-update-situation-report-16-june-2022>).

³⁸ We could not find formal estimates or projections for the impacts of current malnutrition levels on maternal and child mortality. In September 2022, UNICEF Executive Director Catherine Russel suggested that 'we face the very real possibility of young children dying on an almost unimaginable scale in the final months of this year' (available at <https://www.unicef.org/press-releases/unicef-executive-director-catherine-russells-remarks-child-malnutrition-crisis>).

³⁹ UN OCHA (2022). 'Ethiopia Situation Report, 19 September 2022' (available at <https://reliefweb.int/report/ethiopia/ethiopia-situation-report-19-sep-2022>).

⁴⁰ UN OCHA (2022) 'Northern Ethiopia Situation Report, 16 June 2022' (available at <https://reliefweb.int/report/ethiopia/ethiopia-northern-ethiopia-humanitarian-update-situation-report-16-june-2022>).

⁴¹ MSF (2021) 'Tigray crisis: Hospitals and healthcare centres deliberately targeted' (available at <https://msf.org.uk/article/tigray-crisis-hospitals-and-healthcare-centres-deliberately-targetted>).

Education infrastructure has been similarly impacted. Across all of Ethiopia, OCHA reports that as at September 2022, 9,382 schools were fully or partially damaged and more than 2.93 million children remained out of school, including 2.53 million due to violence and conflict. Across Northern Ethiopia, OCHA reports that, as at June 2022, an estimated 1.4 million children in Tigray were entering their third year without access to learning. 963 primary and secondary schools in Tigray remained closed due to lack of resources or insecurity. More than 300 schools in Amhara and 245 schools in Amhara remained closed as well. As with health infrastructure, there is evidence that education infrastructure was attacked, looted, and occupied by the warring parties.⁴²

Civilian property, both of private households and private enterprises, across Northern Ethiopia has been looted or destroyed, including in and around Axum.⁴³ Livestock, crops, and household items have been looted or burned.⁴⁴ Government air strikes have targeted industrial plants that were seen as supporting the TPLF.⁴⁵ The federal government's ambitious industrialisation agenda, which is anchored in the construction of special economic zones ('industrial parks') across the country, has been hit: in November 2020, a private industrial park operated by Bangladeshi garment maker DBL near Mekele, Tigray, was hit and damaged by a rocket attack. Other factories and industrial parks in the north – including a factory run by Italian textile maker Calzedonia and an industrial park set up by Velocity Apparelz Companies – have been temporarily shut down.⁴⁶

⁴² Human Rights Watch (2021) 'Ethiopia: Tigray Schools Occupied, Looted' (available at <https://www.hrw.org/news/2021/05/28/ethiopia-tigray-schools-occupied-looted>).

⁴³ Human Rights Watch (2021) 'Eritrean Forces Massacre Tigray Civilians' (available at <https://www.hrw.org/news/2021/03/05/ethiopia-eritrean-forces-massacre-tigray-civilians>).

⁴⁴ Human Rights Watch and Amnesty International (2022) "'We Will Erase You from This Land": Crimes Against Humanity and Ethnic Cleansing in Ethiopia's Western Tigray Zone' (available at <https://www.hrw.org/report/2022/04/06/we-will-erase-you-land/crimes-against-humanity-and-ethnic-cleansing-ethiopias>).

⁴⁵ Reuters (2022) 'Ethiopia conducts two air strikes on Tigray within hours, war escalates' (available at <https://www.reuters.com/world/africa/capital-ethiopias-tigray-hit-by-air-strike-second-time-this-week-tv-2021-10-20/>)

⁴⁶ Reuters (2020) 'Ethiopia's war risks leaving manufacturing dreams in tatters' (available at <https://www.reuters.com/article/uk-ethiopia-conflict-manufacturing-insig-idUKKBN28J0EF>)

Macroeconomic Implications

Ethiopia's economy continues to face a substantial shock because of the conflict. This is not just due to the destruction of physical assets outlined in the previous subsections, but also because government spending on security, relief, and recovery is leading to extreme pressure on an already tight government budget after increased spending during the COVID-19 pandemic.

Adding to the domestic challenges, the Horn of Africa and parts of Ethiopia have experienced their worst drought in more than four decades, following four consecutive failed rainy seasons, significantly reducing agricultural production.⁴⁷ More recently, the ongoing war in Ukraine and the related increases in global commodity prices for fuel, food, fertilisers, and freight have contributed to rapidly increasing inflation and added significant pressure to the macroeconomic situation.

While it is impossible to disentangle the impacts of these multiple shocks over the past years, it is clear that they have significantly dampened growth and led to large and continued challenges for the management of the macroeconomy. To illustrate the approximate economic costs of the conflict, this section considers a simplistic but transparent counterfactual growth scenario. Overall, we believe that Ethiopia's macroeconomic situation is becoming increasingly difficult to contain and will likely require a re-engagement with external partners to support debt restructuring and alleviate continued balance of payment pressures.

The remainder of this section briefly reviews economic activity, the implications for overall growth forecasts (including our own counterfactual exercise), deficit and debt positions, inflation, and the external position. Before doing so, it is important to recognise key uncertainties that we and other stakeholders face in analysing the economic situation. First, and perhaps most importantly, the degree of destruction of Ethiopia's economic assets, including basic infrastructure, is not yet fully clear. While this destruction will not immediately materialise in headline macroeconomic aggregates, which typically measure flows not stocks, their destruction (and need for reconstruction) will significantly hamper the potential of the economy over the coming years. Second, the full impact of the conflict and drought in part of the country on the agricultural sector will not become clear for some months, though ongoing food security monitoring and real-time remote sensing data from satellite imagery suggests severe food security risks. Finally, it is difficult to quantify longer-term impacts of the conflict on the business climate, investor sentiment, tourism, and donor relationships.

Economic Growth

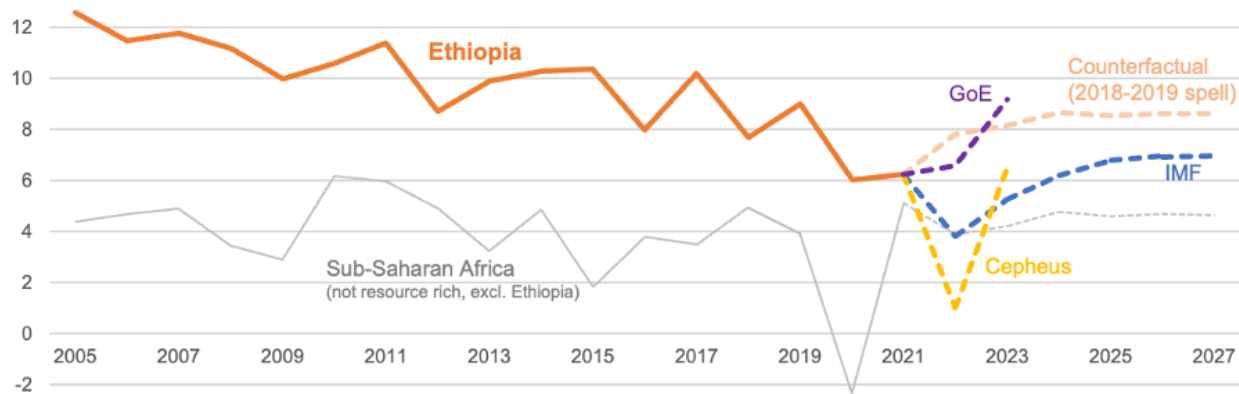
Over the past decade, Ethiopia's economy has seen rapid growth, at rates of 8 to 10 percent per annum – some of the fastest in sub-Saharan Africa. Rapid growth, combined with strong investments in poverty reduction and human capital, have led to significant improvements in living standards for Ethiopians. At the same time, the debt-financed public investment has made the

⁴⁷ UN OCHA (2022) 'Horn of Africa Drought: Regional Humanitarian Overview & Call to Action' (available at <https://reliefweb.int/report/ethiopia/horn-africa-drought-regional-humanitarian-overview-call-action-revised-24-august-2022>).

macroeconomy increasingly vulnerable, by increasing debt and leading to severe foreign exchange shortages.

Growth slightly slowed during the period of political uncertainty, unrest, and protests between 2015 to 2018. The immediate impact of the COVID-19 pandemic on Ethiopia’s macroeconomic situation in fiscal year 2019/20, however, was significantly more limited compared to the rest of the continent. Instead of a strong recovery in fiscal year 2020/21 (as has occurred in many other economies in sub-Saharan Africa, cf. Figure 3), the onset of the protracted and intense conflict is continuing to put immense pressure on the macroeconomic situation. For fiscal year 2020/21, the government reported real GDP growth of 6.3 percent, though this figure reflects conditions before the dramatic expansion of the conflict in the summer of 2022.

Figure 3: Real GDP growth (annual percent change), Ethiopia and sub-Saharan Africa average



Notes: Dashed line indicates forecast. Definition of resource-rich economies follows an IMF policy paper on ‘Macroeconomic Policy Frameworks for Resource-Rich Developing Countries’ (available at <https://www.imf.org/en/Publications/Policy-Papers/Issues/2016/12/31/Macroeconomic-Policy-Frameworks-for-Resource-Rich-Developing-Countries-PP4698>). The method use to arrive at our counterfactual scenario is described in the next subsection and in footnote 52.

Source: IMF ‘World Economic Outlook October 2022’ and Cepheus Growth Capital ‘Quarterly Macroeconomic Review Q1 2022;’

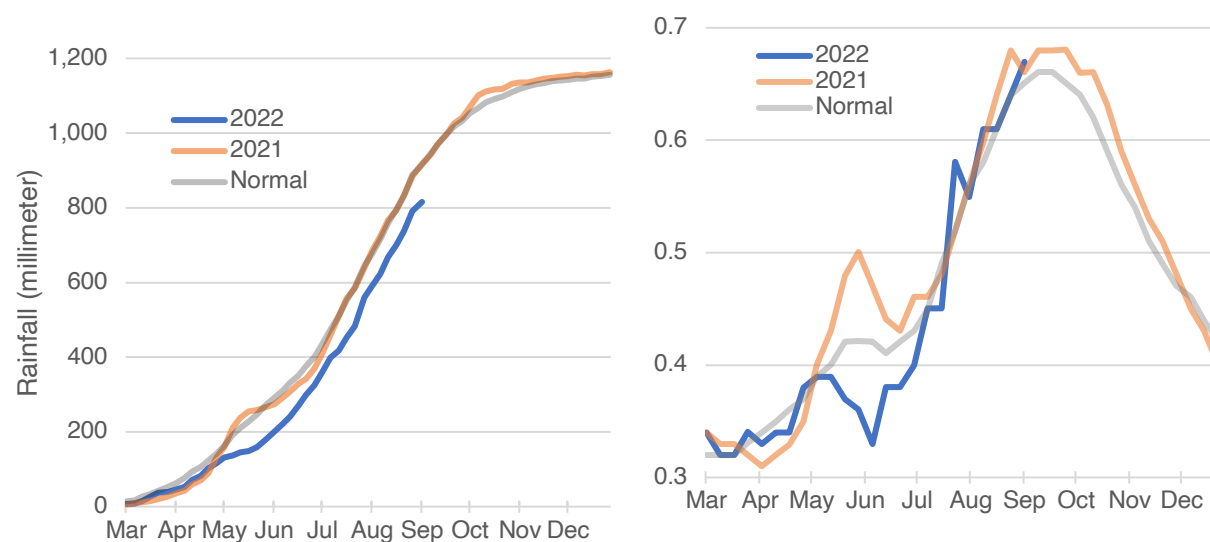
Ethiopia’s macroeconomic outlook for fiscal year 2021/22 and beyond critically depends on sustaining peace, managing the global commodity price shocks and the recovery from drought, and access to international public and private resources to support stabilisation. Existing real GDP growth projections from the Government of Ethiopia of 6.6 percent per year for 2021/22 and from the IMF of 3.8 percent per year (Figure 3) do not take into account the deterioration of the conflict in middle of 2022 and likely under-emphasise the significant economic downturn in regions where measurement of economic activity through traditional methods (e.g. surveys) has become impossible. Even the growth projections by the research team of Cepheus Growth Capital Partners, a widely respected private equity firm in Addis Ababa with intimate knowledge of the Ethiopian economy, assumes a turnaround of the economy in the second half of 2022 and projects real GDP growth of 1 percent per year in 2021/22.

To assess whether these growth forecasts are realistic given recent events, we can turn to higher-frequency indicators of the real economy. We focus on agriculture, which remains a key sector in Ethiopia’s GDP, accounting for just under 40 percent of GDP. In 2022, the Horn of Africa faced its worst drought in more than four decades, with four consecutive failed rainy seasons across the region. For Ethiopia, the March/May (Belg) 2022 rainy season was the driest on record in the last

70 years. This has led to large negative impacts on crop and livestock production in those parts of the country that are dependent on this rainy season, such as the southern and southeastern areas, already typically some of the most food-insecure areas in the country, even if with lower population density than the central highlands.⁴⁸ This negative shock can be observed using satellite imagery and simple remote sensing techniques, such as the normalised difference vegetation index (NDVI), which measures the greenness of vegetation on the ground (cf. Figure 4b).

Figure 4: Rainfall and agricultural production in Ethiopia (2022 vs. 2021 vs. long-term average)

(a) Cumulative rainfall has been significantly below the long-term average... (b) ...and vegetation measures suggest that crop yields will be significantly below average.



Note: Precipitation data is based on five-day data from the Climate Hazards Group InfraRed Precipitation with Station (CHIRPS) dataset and is calculated only for rainfed cropland in Ethiopia based on IFPRI's Spatial Production Allocation Model (SPAM) for 2010. We proxy crop yields with a commonly-used vegetation index, the NDVI from NASA's Moderate Resolution Imaging Spectroradiometer (MODIS) instrument, calculated using the IIASA-IFPRI 2005 cropland mask (Fritz et al., 2015).

Source: Based on US Department of Agriculture Foreign Agricultural Service.

The Meher (main) rainy season, from June to September, is currently estimated to be normal on average (Figure 4a), with vegetation cover since July 2022 closer to average (Figure 4b), although flooding has also been reported.⁴⁹ Early warning systems suggest mixed conditions in the north and south, but favourable in the central parts.⁵⁰ However, even if rainfall does turn out to be closer to normal, the conflict in Tigray has disrupted agricultural production across the entire agricultural value chain. Unavailable inputs, in the form of farm labour, seeds, and fertilisers, may disrupt

⁴⁸ Food Security and Nutrition Working Group (2022) 'Drought Special Report July 2022' (accessible at <https://reliefweb.int/report/ethiopia/fsnwg-drought-special-report-july-2022>).

⁴⁹ Joint Government and Humanitarian Partners Flood Response Plan, Kiremt Flood Response 2022 (available at <https://reliefweb.int/report/ethiopia/ethiopia-flood-response-plan-2022-kiremt-season-floods-august-2022>)

⁵⁰ Geoglam (2022) 'Crop Monitor Early Warning, October 2022', no. 76. (available at <https://reliefweb.int/report/world/crop-monitor-early-warning-no-76-october-2022>).

planting, planted crops may be destroyed, transport corridors may be interrupted, and agricultural markets in which to sell harvested crops suspended. In addition to the immediate and dramatic impacts on food insecurity in the region discussed in the previous section, the shortfall in agricultural production will likely impact overall economic growth.

As a result, we believe that the 2021/22 growth forecast of 3.8 percent per year from the IMF is likely too optimistic and the 1 percent per year forecast from Cepheus Partners more realistic.

An Illustration of Overall Economic Impact

Regardless of the exact forecast, we expect the economic costs of the conflict to be significant. As an illustration, we consider a simplistic but transparent scenario as a counterfactual to the current situation. As illustrated above, Ethiopia's economy grew significantly faster than other non-resource-rich countries in sub-Saharan Africa over the past decades. Our hypothetical scenario (Figure 3, orange dashed line) assumes that, after recovering from the COVID-19 pandemic, Ethiopia's economy maintained this pre-crisis 'growth premium' relative to the rest of the continent. We compare this counterfactual against the growth that the IMF currently forecasts for Ethiopia's economy in the five years from 2022 to 2027.⁵¹

The difference between our scenario and the IMF forecast suggests that, by 2027, the cumulative losses to the Ethiopian economy since the start of the conflict will reach approximately 125 billion current US dollars. This will make the economy 19 percent smaller by 2027 than it would have been without the conflict. This is equivalent to the amount of money required to immediately ensure that 10 million rural Ethiopians, or all urban poor, are out of poverty in the next four years, and represents a setback in economic growth of about one decade.⁵²

⁵¹ More specifically, we consider the period 2018–2020 and we calculate the average annual growth rate of real GDP of 29 countries in sub-Saharan Africa that the IMF categorises as not rich in natural resources (cf. IMF Macroeconomic Policy Frameworks for Resource-Rich Developing Countries (available at <https://www.imf.org/en/Publications/Policy-Papers/Issues/2016/12/31/Macroeconomic-Policy-Frameworks-for-Resource-Rich-Developing-Countries-PP4698>), excluding Ethiopia (an average of 2.18 percent per year). We compare the group's average growth to Ethiopia's growth in the same period (an average of 7.60 percent per year). We define the average difference of 5.42 percent per year as Ethiopia's 'growth premium'. Our counterfactual assumes that Ethiopia will maintain this same growth premium over the rest of sub-Saharan Africa in the five years from 2022 to 2027. We compare this scenario to the most recent IMF growth forecasts. All data is based on the IMF World Economic Outlook Database from October 2022. Our full calculations are available online at <http://www.ethiopiarecovery.ox.ac.uk>.

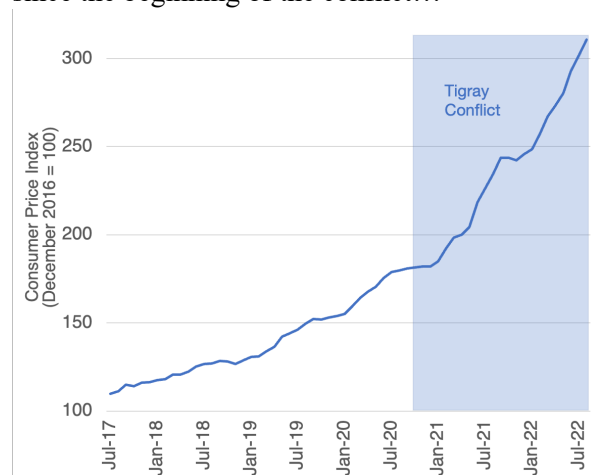
⁵² The total money required to lift the poor above the poverty line using a hypothetical, perfectly-targeted transfer can be calculated based on the 'depth of poverty' or 'poverty gap' – a measure of how far the consumption of the poor is from the official poverty line. As the basis for our calculation, we use the poverty estimates for 2015/16, available in the 2020 World Bank Ethiopia Poverty Assessment (available at <https://documents.worldbank.org/en/publication/documents-reports/documentdetail/992661585805283077/ethiopia-poverty-assessment-harnessing-continued-growth-for-accelerated-poverty-reduction>). We use separate estimates of the poverty gap for rural and urban areas and combine them with population figures from the World Bank's World Development Indicators database.

Inflation

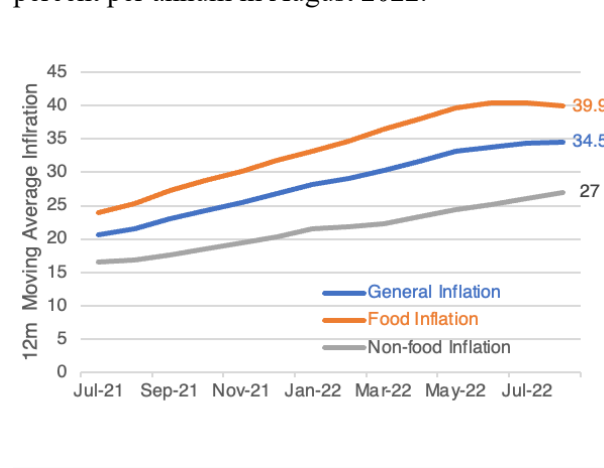
Inflation continues to remain high, at almost 35 percent per annum in August 2022 (using the 12-month moving average inflation rate), mostly driven by inflation in food prices (Figure 5, panel b). This large price increase mirrors the global surge in commodity prices for fuel, fertilisers, food, and shipping. It is difficult to assess the impact of the conflict on consumer prices, but it seems likely that supply disruptions and shocks to agricultural production have at least added to the inflationary pressure. Beyond the macroeconomic implications of high consumer prices, it is worth noting that poorer households will likely be hit harder by inflationary pressures. This is because poorer households tend to spend a larger share of their household income on food (as opposed to non-food).

Figure 5: Consumer price inflation

(a) Consumer prices have been increasing rapidly since the beginning of the conflict...



(b) ...and food price inflation reached almost 40 percent per annum in August 2022.



Note: General Consumer Price Index (CPI) for the entire country shown (indexed to December 2016 = 100). Shaded area marks the onset of the conflict. The 12-month moving average inflation refers to the annual change based on a moving average from the previous 12 months, compared to the same period a year ago. The 12-month moving average inflation is a commonly used longer-term indicator for inflationary pressure on the economy.

Source: Authors' calculations, based on Ethiopian Statistics Service.

Fiscal Policy, Debt, and Balance of Payments

The government's large spending on security, relief, and recovery has led to extreme pressure on an already tight government budget after increased spending during the COVID-19 pandemic. Increased monetary financing of this budget has led to further inflationary pressures. The government has responded to this pressure by reducing budgeted capital expenditures and increasing domestic borrowing. As a result, the government's budget deficit has widened from 2.8 percent of GDP in fiscal year 2020/21 to 4.8 percent in 2021/22 – almost fully funded from

domestic borrowing.⁵³ Overall, approximately half of all government borrowing is external. Adding to the increased fiscal pressure is a shortfall in (grant and loan) disbursements from bilateral and multilateral donors amid the ongoing crisis.

Perhaps the largest pressure on Ethiopia's macroeconomic situation, however, derives from the external sector. Despite the robust export performance of key sectors, including coffee and Ethiopian Airlines, the significant increase in import prices for food, fertilisers, and fuel has led to a worsening trade balance and large outflows of foreign currency. As a result, Ethiopia's foreign exchange reserves are rapidly declining. By the end of 2022, the foreign exchange coverage likely stands well below one month of imports.

⁵³ Cepheus Research and Analytics Note: Ethiopia's 2022-23 Budget (<https://cepheuscapital.com/ethiopias-2022-23-budget-rev1-pdf/>).

Peace, Stability, and Security

The ongoing conflicts in Ethiopia have not just caused serious human, economic and costs. They also have greatly undermined the state's monopoly on the legitimate use of violence – one of the most basic indicators of the modern state.⁵⁴ The resulting instability imposes significant economic, social, and political costs on the entire country and the broader region.

From Relative Peace to Full-Scale War

Between 1974 and 2000, Ethiopia witnessed a devastating civil war (1974–1991), a failed coup, numerous insurgencies, the brutal Red Terror campaign against the political and armed opposition, war with Somalia (1977–78), and war with Eritrea (1998–2000). The period also saw a catastrophic famine in the mid 1980s that killed hundreds of thousands of people. Despite significant allegations of human rights violations and repression, the years 2000 to 2015 were arguably the most stable period of the past 50 years. The country saw a massive expansion of statecraft, the reconstruction of the state apparatus, and institutional consolidation and stabilisation. Investment in basic services and infrastructure brought unprecedented economic growth and development year after year. The relative stability and economic achievements were challenged by the rising political grievances, nationalist mobilisations, elite fragmentation and social and protest movements that characterised the years before the 2018 change of leadership.

The start of the Tigray war and increasing insurgency in Oromia effectively ended this long period of relative peace and prosperity. Weakening capabilities of the state security institutions resulted in more unrest and instability. The Tigray conflict was a full scale, all-out war involving hundreds of thousands of troops and a foreign army, Eritrea. The disastrous impact of the war on the state security apparatuses, like the military and the regional security institutions, led to a security vacuum in the central, western, and southern parts of the country, which allowed armed insurgent movements like the Oromo Liberation Army (OLA), Benishangul Defence Force (BDF), and the Gambela Liberation Front (GLF) to expand their geographic reach, recruitment, and training capabilities.⁵⁵ The period also witnessed intensified vertical and horizontal violence between Afar and Somali regions, and among ethnic groups in Amhara, Benishangul-Gumuz, and Gambella regional states.⁵⁶

Militarisation and Securitisation of the Public Space

One of the unintended consequences of the war in Tigray is the increasing capacity and autonomy of regional security structures. The initial objectives of the 'Law Enforcement Operations' included disarming the TPLF, restoring legitimate administration to Tigray, and bringing fugitives to justice.⁵⁷ An operation that aimed to weaken the security apparatus of one regional state, Tigray,

⁵⁴ Max Weber (1921) 'Politik als Beruf', In: *Geistige Arbeit als Beruf. Vier Vorträge vor dem Freistudentischen Bund. Zweiter Vortrag*. Duncker & Humblot: Munich.

⁵⁵ 'Oromo and Amhara militants battle on western frontier' (available at <https://www.ethiopia-insight.com/2022/06/01/oromo-and-amhara-militants-battle-on-western-frontier/>).

⁵⁶ 'Abiy Ahmed's power base is more fragile than ever' (available at <https://www.ethiopia-insight.com/2022/06/14/abiy-ahmeds-power-base-is-more-fragile-than-ever/>).

⁵⁷ 'The Ongoing Law Enforcement Operations in Tigray: Causes and Objectives', <https://twitter.com/PMEthiopia/status/1327561270359371776>

resulted in the strengthening of security forces in other regions. At the time of the protest and social movements (2015–2018) that brought PM Abiy Ahmed to power, the federal security and intelligence apparatuses were weakened, and regional governments significantly expanded their security capabilities, resulting in conflicts between regional states. The Oromo-Somali border conflict of 2016–18, fought between the Somali region special forces and the Oromia regional special forces and militia, resulted in significant internal displacement. The post-2018 administration promised reform of the regional security forces and pledged to assert federal oversight over, and coordination and standardisation of, regional security institutions. In 2019, the Ministry of Peace declared that the size, training, arms, and command structure of regional security institutions were beyond their constitutional mandate and launched efforts to downsize and downgrade them.

Political tensions and instabilities, the war in Tigray, and insurgencies across the country forced the government to shelve the regional reform agenda as the magnitude and geographic reach of the conflicts were beyond the capacity of the federal security institutions.⁵⁸ The involvement of regional special forces in the Tigray war and counter-insurgency operations in Oromia, Benishangul-Gumuz, and Gambella was used to justify massive conscription to, investment in, and an expanded mandate and operations for the regional police, special forces, and militia. Oromia, Amhara, and Afar regional states expanded their special forces citing the OLA and TPLF threats. The threat of Al-Shabaab justified the expansion of the Somali regional security infrastructure.⁵⁹ The period saw the effective transformation of the regional police and special forces into para-military structures and quasi-regional armies.

The conflicts and subsequent militarisation of the public space also changed the nature and magnitude of the conflict between the two biggest regions, Oromia and Amhara. Contested boundaries and spheres of influence between the two regions which experienced small skirmishes have witnessed the involvement of regional militia, special forces, and the leadership of the local governments. On 4 April 2022, the Oromia regional state government issued a warning to ‘extremist forces operating in the name of Amhara’. The statement claimed these forces had ‘infiltrated into the Oromia region and committed disgusting acts’, which had ‘gravely angered’ the people of the region, and warned that the Oromia state government ‘strongly believes that it is not appropriate to remain silent’ when ‘this extremist force’ disseminated its ‘disgusting acts’ using various media outlets, including the regional government media, and ‘preaching hatred and violence.’⁶⁰ The statement referred to a violent incident between Oromo and Amhara security forces a few days earlier. On 30 March 2022, a confrontation between Amhara militia and Oromia police and militia in a border between Oromia and Amhara claimed the lives of 26 members of the Oromia regional state security forces. The incident took place less than 150 kilometres outside the capital Addis Ababa.⁶¹ The same month saw an accusation by the Oromia regional state that the Amhara regional government and its security forces had forcefully annexed a section of land from

⁵⁸ ‘Regional Special Forces Pose Threat to Peace and Security in Ethiopia’ (available at <https://theglobalobservatory.org/2021/02/regional-special-forces-pose-threat-to-peace-and-security-ethiopia/>).

⁵⁹ ‘The endless war against Al-Shabaab’ (available at <https://www.thereporterethiopia.com/26987/>).

⁶⁰ ‘Oromia State Doubles Down On Accusations Against “Amhara Extremist Group” for “Causing Damage”’ (available at: <https://allafrica.com/stories/202204130117.html>).

⁶¹ ‘Ambush on militia in Ethiopia's Oromiya region kills 26’ (available at <https://www.reuters.com/world/africa/ambush-militia-ethiopia-romiya-region-kills-26-2022-03-31/>).

Oromia regional state.⁶² The targeting of Amhara civilians in Oromia by the OLA and ethnic and religious conflicts in the Oromo autonomous zone in the Amhara region are also widening differences. The increasing tension between the regional security institutions of Oromia and Amhara has a destabilising impact on the federal government.

The Tigray war has legitimised the presence, activities, and membership of informal armed groups fighting alongside the government. In the second phase of the Tigray war (June–December 2021), the federal and Amhara regional governments allowed members of the Fano to establish their own parallel military camps, and recruitment and training centres, and to use the state’s logistical, security, and administrative infrastructure and equipment. Attempts to stop these privileges and to close the camps resulted in violence.⁶³

Security Implications Beyond Ethiopia

These developments have had significant political, economic and security implications for the regional governments and the broader country, as well as for the Horn of Africa region. The increasing capabilities of the Afar special forces are considered a threat by Eritrea, which sees the emergence of a politically and militarily strong Afar State across the border as a potential inspiration for its own Afar minority. The Red Sea Afar Democratic Organisation (RSADO), an organisation of the Afar people in Eritrea, sees the Ethiopian Afar regional state as a model to emulate, or as a kin state to join.

With one-third of its population being Afar, Djibouti is also watching these developments with concern. The Issa clan of Somali is the majority in Djibouti, and the Afar–Issa conflict in Ethiopia at times ignites conflict between the two communities within Djibouti.⁶⁴ On 7 October 2022, Djibouti accused the Front for the Restoration of Unity and Democracy, an Afar armed movement, of killing seven Djibouti soldiers at a military base in the eastern part of the country. The attack escalated tensions between the Afar and Issa political groups in Djibouti, raised tensions with Eritrea, and affected relations with Ethiopia. In the same week, a high-level Djiboutian delegation, led by the country’s head of intelligence, travelled to Addis Ababa to express Djibouti’s concern and discuss the incident.⁶⁵ Djibouti, which has tried to remain neutral in the Tigray war, is worried about the intensification of violence in Ethiopia.⁶⁶

⁶² ‘280 hectares of land from Kimbabit woreda in North Showa zone of Oromia region annexed to Amhara region’ (available at <https://addisstandard.com/news-280-hectares-of-land-from-kimbabit-woreda-in-north-showa-zone-of-romia-region-annexed-to-amhara-region/>).

⁶³ ‘News analysis: Clashes between armed Fano, local security result in casualties in Mota city; officials blame ‘unidentified armed group’ for death of security forces’ (available at: <https://addisstandard.com/news-analysis-clashes-between-armed-fano-local-security-result-in-casualties-in-mota-city-officials-blame-fano-for-death-of-security-forces/>).

⁶⁴ ‘Djibouti: Can IOG ‘finish the job’ during his last term in office?’ (available at <https://www.theafricareport.com/168493/infographics-djibouti-can-iog-finish-the-job-during-his-last-term-in-office/>).

⁶⁵ ‘National Security Advisor Holds Talks with Djiboutian Delegation’ (available at <https://www.ena.et/en/?p=39014>).

⁶⁶ ‘Armed attackers kill seven Djibouti soldiers - presidential adviser’ (available at <https://www.euronews.com/2022/10/09/djibouti-attacks>).

The increasing military capabilities of Afar and Somali regions is changing the nature and dynamics of their boundary conflict over three contested *kebeles* (wards – the smallest administrative unit in Ethiopia) between the two regions. Clashes and skirmishes, which used to take the form of communal violence involving civilians, and *kebele* and *woreda* (district) militia, have evolved into much deadlier engagements between well-armed and trained members of the Afar and Somali special forces. Recent conflicts have resulted in hundreds of casualties and thousands of IDPs.⁶⁷ Unlike the conflict in the geographic peripheries of western Oromia, Benishangul-Gumuz, and Gambella, the Afar–Issa conflict has immediate and serious political, economic, and geopolitical implications for Ethiopia as it disrupts the rail and highway links between Addis Ababa and Djibouti, an important route for international trade. Recent attempts by the federal government to resolve the crisis have failed. A peace conference in Adama City brokered by the Ministry of Peace saw a peace deal that called for an immediate cessation of hostilities, the withdrawal of special forces from the contested areas, and a return of IDPs. The agreement was breached within weeks after its signing, with a clash between the security forces of the two regional states.

In July 2022, the perceived security vacuum created by the movement of the military stationed in the Somali region to north Ethiopia, and the involvement of the Somali region special forces in the Tigray war, led Al-Shabaab to launch its most coordinated offensive on Ethiopia. Thousands of Al-Shabaab fighters entered the Somali region of Ethiopia, advancing as far as 150 kilometres inside the border, trying to take advantage of the different conflicts in the country.⁶⁸ The Somali regional special forces and the Ethiopian military thwarted the attack. However, this was the first time the group had launched an attack of this magnitude inside Ethiopia, and the group described its pioneering adventure as a signal of its new mode of engagement with the Ethiopian state and vowed to scale up its activities targeting Ethiopia. In June 2022, the Gambella Liberation Front (GLF) and the Oromo Liberation Army overran Gambella city, the capital of the region, killing scores of regional security forces.⁶⁹ The security forces later regained control of the city after a period of deadly urban warfare. This incident, where insurgent movements controlled a capital of a regional state even for a short time, has exposed the vulnerability of institutions in the conflict-affected areas.

The third round (August 2022- October 2022)

On 24 August 2022, the third round of the Tigray war resumed. The federal government and the Tigray regional government blamed each other for breaching the unilaterally declared ceasefire. On 20 September 2022, the Tigray regional government announced that joint Ethiopian and Eritrean forces, backed by Amhara regional special forces and Fano, had launched a full-scale

⁶⁷ ‘Somali region says thousands displaced in clashes bordering Afar state; victims in dire need of aid’ (available at <https://addisstandard.com/news-somali-region-says-thousands-displaced-in-clashes-bordering-afar-state-victims-in-dire-need-of-aid/>).

⁶⁸ ‘Al-Shabab Faces Pushback in Ethiopia’s Somali Region’ (available at <https://www.voanews.com/a/al-shabab-faces-pushback-in-ethiopia-s-somali-region-/6695040.html>).

⁶⁹ ‘What’s Behind Violence in Ethiopia’s “Other” Conflict?’ (available at <https://www.voanews.com/a/what-s-behind-violence-in-ethiopia-s-other-conflict-/6729178.html>).

offensive on six fronts.⁷⁰ The last round of the Tigray war has been the most intense and arguably the most deadly of the three rounds, as the parties to the conflict have had months to prepare for it. Both sides had been conscripting, training, and arming hundreds of thousands of new recruits. The war reduced Tigray to a war zone and its economy to a war economy. Tigray's regional government declared that the last round of conflict posed an existential challenge to the Tigray nation and demanded 'the full participation of every single Tigrayan'. The declaration called upon the residents of the region to 'make [themselves] fully available for the all-round war'.⁷¹

Governance and State Capacity

The Tigray war, insurgency, and violence are diverting the resources, priorities, and attention of the state. While security and intelligence institutions have been strengthened, civilian administration and governance bodies have been sidelined. This undermines effective policymaking and adversely affects the delivery and quality of public services.

Growing Imbalance in Civil and Military Relations

At the federal level, the security situation has increased the visibility, reach, and mandate of the military and its leadership. Numerous members of the military leadership have become household names and regular guests on national television stations, discussing not only security issues, but expressing strong political views on contentious historical, identity, and constitutional issues. The situation has emboldened the military as regards taking on political and public roles. This is threatening efforts to realise democratic civil–military relations characterised by civilian oversight and democratic control of the armed forces. The government has significantly increased investments in an expansion of the military and in its technological and institutional capabilities, backed by a 500 percent increase in the federal budget for the military.⁷² This increase in military spending without strong civilian oversight is boosting the economic power of the military and its influence on rent distribution and patronage.

At the time of the second phase of the Tigray war (June–December 2021), the Amhara regional government called for total regional mobilisation and diversion of the regional budget, institutions, and logistical capabilities to the war effort.⁷³ At the time of writing in December 2022, Amhara region, the second biggest member of the federation, is still on a war footing. The increased power of the security institutions in public and political lives is also visible at the regional, zonal, *woreda*, and *kebele* levels, affecting the autonomy of administrative bodies and shifting the priorities and resources to peace and security even in areas that are not directly affected by the conflicts.

⁷⁰ 'Tigrayan forces accuse Eritrea of launching full-scale offensive on border' (available at <https://www.theguardian.com/world/2022/sep/20/tigrayan-forces-accuse-eritrea-of-full-scale-offensive-on-ethiopia-border>).

⁷¹ 'Statement from The Central Command of the Government of Tigray' (available at <https://tghat.com/2022/09/20/statement-from-the-central-command-of-the-government-of/>).

⁷² 'Ethiopia government to increase military budget by 500%' (available at <https://addisinsight.net/ethiopia-government-to-increase-military-budget-by-500/>).

⁷³ 'Ethiopia's Amhara State Rallies Youth to Fight Tigrayans as War Expands' (available at https://www.voanews.com/a/africa_ethiopias-amhara-state-rallies-youth-fight-tigrayans-war-expands/6208694.html).

Decisions by security officials can sidestep democratic procedures and lack transparency and accountability. The securitisation of public administration and local government is used as a justification to trump principles of good governance, including transparency and accountability of the executive.

This imbalance between the civil and military authorities could leave a lasting legacy in terms of defining governance trends in Ethiopia. The economic challenges, increased political polarisation and ethnic divisions, absence of an ideological framework, and indoctrination are affecting the cohesion, capacity, and hierarchy of the state bureaucracy. The same factors are also resulting in increased rent extraction and higher levels of corruption.

The conflicts have weakened the ideological and organisational foundation of the Ethiopian state apparatus. The former ruling party, the EPRDF, traditionally applied a comprehensive political and economic ideological framework to justify the vanguard nature of the party and its hierarchical decision-making. This framework asserted the need for a strong and autonomous party and state apparatus to bring about development, elite cohesion, peace, and national unity. The war has accelerated the departure from the ideological roots of the TPLF-dominated EPRDF, leading to the rise of a ‘post-ideological’ or ‘non-ideological’ state, with less clarity on economic and governance issues. The mass nationalist mobilisations and the securitisation of administrative structures has undermined the old narrative that asserted that economic development should take precedence over the self-rule of the regional states and national groups in Ethiopia. The war has also exacerbated old contradictions and new competition emerging from the ideological paradox relating to the federal system and the centralised economic planning of the developmental state. The weakening of local government and the emergence of competing narratives with weaker politico-economic ideological foundations has affected party cohesion and horizontal cooperation among multinational elites, resulting in institutional paralysis at different levels and in different branches of the state.

Blurred Lines Between Civilians and Combatants in Intercommunal Conflict

The security vacuum created by the relocation of the military, federal police, and regional special forces from conflict areas to the war in the north is continuing to result in increases in crime, communal violence, and rebel and insurgent activities in Oromia, South, Benishangul-Gumuz, and Gambella regions, and along the Afar–Somali boundaries. Oromia is the most affected. The level of the insurgency, communal violence, and targeted attacks on civilians has significantly increased in the past year. In June and July 2022 hundreds of civilians were killed in a series of attacks in west Oromia.⁷⁴ The government blamed the Oromo Liberation Army (known as Shane) for the attacks, while Shane claimed the attacks were committed by government-supported counter-insurgency para-militia. The two high-profile incidents and the continued targeting of civilians widened differences among the top leadership of the Oromia and Amhara chapters of the PP, the party established by PM Abiy Ahmed as a successor to the EPRDF. The PP claims to be a post-ethnic, overarching Ethiopian political party. However, the regional chapters of the party retained the members, arrangement, and infrastructure of the ethnic parties of the EPRDF. The TPLF

⁷⁴ ‘Ethiopia: Civilians in Western Oromia Left Unprotected’ (available at <https://www.hrw.org/news/2022/08/31/ethiopia-civilians-western-romia-left-unprotected>).

rejected the invitation to join the PP, while the member parties of the EPRDF in Oromia, Amhara, and Southern regions continued as regional chapters of the PP in their respective regions.

The series of mass civilian killings in western Oromia drew outrage and condemnation. On 5 July 2022, Deputy Prime Minister and Foreign Minister Demeke Mekonnen said, as part of the efforts to respond to the targeting of civilians, that the government would expand the capacities of self-defence local militias and community policing in the rural *kebeles* and settlements due to the threat of further attacks by Shane.⁷⁵ His statement was similar to the one he made in a visit to displaced Amhara civilians from Benishangul-Gumuz, when he called for arming civilian Amharas in the Metekel zone of Benishangul Gumuz so they can protect themselves. Building the self-defence capabilities and infrastructure of minorities in a complex political and security situation could have complex implications for the nature of the conflict. The decision to organise and arm civilians to protect themselves was perceived as an admission of a lack of capacity and an abdication of the state's responsibility to protect civilians by the government.

The realisation of the plan added a new dimension to the complex security situation and political instability, and worsened communal and intergovernmental relations by blurring the line between civilians and combatants. The evolution and expansion of self-defence groups, with their own political economy, will have implications for the structure of local government and peace and political efforts. In August 2022, another mass killing of civilians took place in Agamsa, west Oromia. Witnesses and activists claim armed men killed more than 90 civilians, including women, children, and the elderly, in the remote Oromia kebele near the Amhara region. Thousands were also displaced because of the attack. The attack was presented as a revenge attack by groups armed to protect civilians from possible attacks by the Oromo Liberation Army.⁷⁶ The incident complicated inter-ethnic relations in western Oromia and beyond, and is the biggest security problem Ethiopia faces next to the Tigray war .

Beyond blurring the line between who is a civilian and who is a combatant, the practice of creating self-defence groups complicates disarmament, demobilisation and reintegration and security sector reform initiatives as part of peace and political processes and reconstruction and recovery efforts in the conflict-affected areas. The delegation of certain security and intelligence roles to community vigilante groups and neighbourhood watches during the second round of the Tigray conflict (June 2021–December 2021) increased arbitrary detentions and extortion. In some cases, groups created to defend the capital and cities like Dessie and Kombolcha from a possible TDF advance were accused of maintaining their network and mandate for crime and extortion. The war has also been used to justify arbitrary detention and search without warrant practices, which have been used by the police to demand protection money from Tigrayan and non-Tigrayan businesses and residents in major urban centres.⁷⁷ The declaration by the Amhara regional government that civilians can own weapons they confiscate from TPLF fighters has further legitimised the arbitrary use of the law and encouraged criminal activities. In a parliamentary session in February 2022, PM Abiy admitted that members of the Fano, an informal armed group in the Amhara region, had

⁷⁵ 'Ethiopian government to intensify protection of vulnerable civilians after recurrent rebel attacks: Deputy PM', (available at <https://english.news.cn/africa/20220706/4888eaddf6da476dab15ebfac1fd1058/c.html>).

⁷⁶ 'Witnesses say dozens killed in new ethnic attack in Ethiopia' (available at <https://abcnews.go.com/International/wireStory/witnesses-dozens-killed-ethnic-attack-ethiopia-89231227>).

⁷⁷ 'Ethiopian officials accused of extorting Tigrayan detainees' (available at <https://www.aljazeera.com/news/2022/2/10/ethiopian-officials-accused-of-extorting-tigrayan-detainees>).

killed members of the ENDF to steal sophisticated weapons from soldiers. In a coordinated attack on a correctional facility, unprecedented in recent history, on 7 February 2022, well-armed groups flooded and stormed a regional prison in Nefas Mewcha town in Amhara region. The group killed policemen, looted firearms from the arsenal of the regional state police, and succeeded in freeing 130 prisoners. The Amhara regional government blamed groups affiliated with Fano for the prison break.⁷⁸

The years before the start of the Tigray war and the intensification of the insurgency in Oromia had already seen an increase in the demand for, and circulation, and trading of, small arms and light weapons across Ethiopia. The privatisation and decentralisation of the monopoly on violence, which has weakened the state security institutions, has facilitated the increase in the flow and distribution of small arms to political groups and individuals. The cultural practice of bearing arms in some parts of the country has taken on a political turn as armed civilians have formed informal units, resulting in massive spikes in violent confrontations with the state. Political tensions, violence, and the inability of the state to guarantee the safety and security of its citizens has been driving the increasing arms market. In addition to Kalashnikovs, which are popular in rural Ethiopia and small towns, increased crime and political uncertainty is raising the demand for handguns in urban areas like Addis Ababa.⁷⁹

Excluding the military mobilisation in Tigray, there are currently between a million and a million and half members of the different security apparatuses at the federal and regional levels. This includes the significant expansion of the ENDF from its pre-war size of 130,000–140,000 to its currently estimated around half a million active combatants, conscripts, and reserves. The mobilisation and participation of federal police, regional police, regional special forces, and regional militias of the Amhara, Oromia, Afar, Somali regions puts the overall size of the national security sector way beyond the million mark. This massive mobilisation and expansion of the military and security institutions has equipped hundreds of thousands of formerly unemployed youth with military skills and has exposed them to state and war craft. As the government cannot finance and sustain such a large force for an extended period, the issue of demobilisation will become a key concern for post-conflict reconstruction and development initiatives. The demobilisation of hundreds of thousands of former combatants in an economy suffering from high inflation, high unemployment, and slowed growth may lead to additional security threats. The inability to provide economic opportunities and political platforms for former combatants could worsen insurgencies, further undermining the state's monopoly on violence, and increasing organised crime.

⁷⁸ 'Prisoners on the run after Ethiopia jailbreak' (available at <https://www.newtimes.co.rw/africa/prisoners-run-after-ethiopia-jailbreak>).

⁷⁹ 'Two Suspects Caught Redhanded with 50 Illegal Firearms' (available at <https://ethiopianmonitor.com/2021/11/18/two-suspects-caught-redhanded-with-50-illegal-firearms/>).

Social Cohesion, Political Settlements, and Nation Building

The different ongoing conflicts have deepened divisions between, and polarisation of, cultural, linguistic, religious, and political groups, and further widened differences in understandings of nationhood, statehood, and citizenship.

The conflicts have strengthened Tigrayan, Amhara, Oromo, Afar, and Somali nationalist movements, which have competing and contradictory understandings and interpretations of history, symbols, and nation building. Debates on the formula for power and resource distribution, representation, and autonomy dominate the political and public spheres. Disagreement and differences over the current (agreed in 1995) Constitution of Ethiopia and its federal structure are widening, with some calling for its abolition and others demanding a looser federation or regional self-determination. Massive public mobilisations and aggressive media and propaganda campaigns have normalised hate speech and genocidal rhetoric from political and social leaders.⁸⁰ Hate speech that is used to mobilise the war and to target ethnic and political groups has harmed social cohesion, widened political and social divisions, and complicated the possibility of comprehensive peace and justice processes. This has also led to a reexamination of the relationship between the Tigrayan nation and the Ethiopian state, and increased grievances in parts of Oromia, Amhara, and South regions.

One of the most significant signs of disintegration is the split in the Ethiopian Orthodox Church and subsequent decision of the church in Tigray to cut ties with the Ethiopian Orthodox Church synod and establish the Tigrayan Orthodox Church. This is unprecedented.⁸¹ The schism in the oldest institution in Ethiopia symbolises and embodies the intensity of the political and social rupture caused by the war. Axum Mary and Al-Nejashi, arguably the holiest Orthodox Christian and Islamic sites in Ethiopia, have also witnessed violence and destruction. The massacre in Axum Mary⁸² and the damage to the Al Nejashi Mosque have widened religious and ethnic divisions.⁸³ Numerous ancient religious scripts, with some artefacts as old as 500 years, were looted from churches in Tigray and were later put up for auction online.⁸⁴ Religious conflict and violence in Amhara, Oromia, South, and Somali regions have resulted in the burning of more than 50 mosques and churches, and the death of hundreds of civilians, in the past three years.⁸⁵

The Tigray war has widened faultlines, increased mistrust, and expanded divisions among different cultural and linguistic groups in Amhara region. The past two years have seen the rise and

⁸⁰ ‘Genocide fears after Ethiopian PM vows to crush “weeds” of Tigray’ (available at <https://www.thetimes.co.uk/article/abiys-pledge-to-crush-weeds-of-tigray-raises-fears-of-genocide-in-ethiopia-sx0xkqb2v>).

⁸¹ ‘Tigrayan Orthodox Church split has deep political roots’ (available at <https://www.africaintelligence.com/eastern-africa-and-the-horn/2022/02/18/tigrayan-orthodox-church-split-has-deep-political-roots,109735105-eve>).

⁸² ‘Ethiopia: Eritrean troops’ massacre of hundreds of Axum civilians may amount to crime against humanity’ (available at <https://www.amnesty.org/en/latest/news/2021/02/ethiopia-eritrean-troops-massacre-of-hundreds-of-axum-civilians-may-amount-to-crime-against-humanity/>).

⁸³ ‘Ethiopia conflict: Outrage over damage to Tigray mosque’ (available at <https://www.middleeasteye.net/news/ethiopia-tigray-nejashi-mosque-conflict-damage>).

⁸⁴ ‘Ethiopian artefacts on eBay spark fears of looting from war-torn Tigray’ (available at <https://www.independent.co.uk/news/world/africa/ethiopia-relics-artefacts-tigray-conflict-b2010985.html>).

⁸⁵ ‘Over 20 killed in anti-Muslim attack in Ethiopia: Islamic group’, (available at <https://www.france24.com/en/live-news/20220427-over-20-killed-in-anti-muslim-attack-in-ethiopia-islamic-group>).

institutionalisation of Agew nationalism, which includes the Kemant people, a group demanding an autonomous zone in north Gondar. The Agew opposition claim longstanding marginalisation, poor representation in the regional government, and uneven development as grounds for their demand for autonomy. The Agew National Council (ANC) has accused the ruling Amhara PP of trying to erase the identities and autonomous administrative structures of the Agew. The regional government views Agew nationalist movements as externally funded projects designed to divide and weaken the Amhara nation and region. The Amhara regional government launched a crackdown on Agew and Kemant activists and politicians following the start of the Tigray war. This led to the Agew Liberation Front (ALF) openly collaborating with the TPLF when the TPLF controlled the capital of the autonomous Wag Zone, Sekota, in July 2021.⁸⁶ The Oromo Nationality Zone Administration, one of the three autonomous national administrations in Amhara regional state, has also seen a surge in conflict in the past two years. The Tigray war significantly complicated the crisis in the Oromo zone. The collaboration of local members of the OLA with the TPLF, which controlled the seat of the zonal government Kемisse in October 2021, has worsened communal relations.⁸⁷ Subsequent crackdowns on armed groups in the area resulted in alleged extrajudicial killings, torture, and mass arrests.⁸⁸

The federal government cites the 2019 and 2021 referendums and subsequent additions of the Sidama and South West Ethiopia regions as new members of the federation as testaments to its commitment to and respect for the implementation of a ‘true multinational federalism’. It has also pledged to respond constitutionally to close to a dozen demands for regional statehood in the Southern Nations Nationalities Regional State (SNNPR). The ongoing conflicts have disrupted political and legal processes to respond to these demands. The August 2022 decision by the federal government to address the demands for regional statehood in SNNPR through a ‘cluster arrangement’ is raising constitutional questions and causing political instability and insecurity in the region. The federal government has capitalised on the hierarchical security, administrative, and political decision-making culture and mechanisms that emerged after the Tigray war to force the zonal administrations and councils to approve the new arrangement that was previously opposed by the zonal leadership as unconstitutional. If this plan is implemented, the SNNPR – which has already seen the departure of Sidama and South West Ethiopia in the past three years – would cease to exist and would split into two regional states. Council leaders in Gurage Zone have been hesitant to agree to the proposals, exposing the deep divisions among the political leadership of the region and casting doubt on the plan’s sustainability.⁸⁹ Protests started in different towns of Gurage Zone, rejecting the new arrangement and demanding a referendum for regional statehood. Wolayta Zone has also seen strong resistance to the proposed arrangement. On 7 August 2022, government security forces arrested a prominent Wolayta political activist and advocate for

⁸⁶ ‘Ethiopia crisis deepens as nine groups form anti-government alliance’ (available at <https://edition.cnn.com/africa/live-news/ethiopia-conflict-updates-11-5-intl/index.html>).

⁸⁷ ‘Tigrayan and Oromo forces say they have seized towns on Ethiopian highway’ (available at <https://www.reuters.com/world/africa/tigrayan-forces-say-they-have-seized-another-town-ethiopias-amhara-region-2021-10-31/>).

⁸⁸ ‘Ethiopia rights body says video shows extrajudicial killings’ (available at <https://www.reuters.com/world/africa/ethiopia-rights-body-says-video-shows-extrajudicial-killings-2022-06-19/>).

⁸⁹ ‘Gurage Zone Council declines new cluster restructuring, stick to earlier request’ (available at <https://addisstandard.com/news-update-gurage-zone-council-declines-new-cluster-restructuring-stick-to-earlier-request/>).

Wolayta statehood, Assistant Professor Assefa Wodajo, in the zonal capital Sodo.⁹⁰ The political decision to restructure the SNNPR will also have an impact on the future of the constitution, cohesion, economic performance, and security of the new states.

At the end of 2021, the Ethiopian parliament established a National Dialogue Commission, aimed at reaching some kind of consensus amongst the political and thought leaders in the country. The success of this endeavour hinges on buy-in from the various parties, and progress to this end has been slow. The association of the TPLF with the current constitution has legitimised coordinated media attacks on the federal system and the governance model of the EPRDF. The ruling PP has given mixed signals on the future of the existing state model and the constitution. This has resulted in widening differences in views on history, identity, nationhood, and state building among multiple linguistic, cultural, religious, and political groups. Strong political views held by the chairperson of the National Dialogue Commission on federalism, and the continued absence of meaningful Tigrayan and OLA participation in the preparation and launch of the National Dialogue Commission, have cast doubts on the legitimacy of the process and the credibility of its outcomes. The lack of coordination of peace processes in Tigray, Oromia, Amhara, Afar, and Somali with the National Dialogue is creating competing parallel processes characterised by increased polarisation, which are worsened by ongoing conflicts.

Democracy and Accountability

As we discussed above, the war, counterinsurgency, and violent crackdown on rebel and opposition groups and militias have securitised and militarised the political and public spaces in Ethiopia. The war and the state of emergency has suspended constitutional rights, legitimised arbitrary detentions, and increased the suppression of political rivals. These developments have reversed the gains of the fragile political transition of 2018 that pledged political liberalisation and democratisation.

The war has been used to justify repression, attacks on free speech, and the imprisonment of members of the opposition, the media, and the civil society.⁹¹ The war mobilisation effort has exposed the authoritarian nature of the state. The mass public mobilisation for the war effort has increasingly privatised and decentralised the monopoly on violence and encouraged the expansion and politicisation of informal armed groups and militias in several regions.⁹² Both state and non-state armed and political groups have been responsible for repression and gross violations of human and political rights. The 2021 elections were boycotted by the major opposition parties in the two biggest regional states and failed to provide democratic legitimacy to the government. The Oromo Federalist Congress (OFC) and the Oromo Liberation Front (OLF), the two most important opposition groups in Oromia, the biggest and largest region in Ethiopia, pulled out of the election

⁹⁰ 'Security forces in Wolaita detain prominent scholar, opposition member Asefa Wodajo' (available at <https://addisstandard.com/news-security-forces-in-wolaita-detain-prominent-scholar-opposition-member-asefa-wodajo/>).

⁹¹ 'Media Arrests 'Reverberate' Across Ethiopian Newsrooms' (available at <https://www.voanews.com/a/media-arrests-reverberate-across-ethiopian-newsrooms-/6620706.html>).

⁹² 'Ethiopia's Tigray War Is Fueling Amhara Expansionism' (available at <https://foreignpolicy.com/2021/04/28/ethiopia-tigray-war-amhara-abiy-ahmed-expansionism/>).

citing the imprisonment of their leaders, the closure of their offices, and the killing, detention, and intimidation of their members.⁹³ Jawar Mohammed and Bekele Gerba, the two prominent leaders of the OFC, were released six months after the elections. These detentions resulted in the PP winning virtually uncontested, undermining the legitimacy of the regional and federal government in Oromia. The Ogaden National Liberation Front (ONLF), the major opposition group in the Somali region, also boycotted the polls. The government was accused of using the war mobilisation to manipulate state institutions and the elections in its favour.⁹⁴

The civil society and governance space in Ethiopia has experienced radical reforms since the 2018 political transition. The legal and political reforms launched by the new government have altered the operational, regulatory and political context for civil society organisations (CSOs). As the country's social fabric has been harmed by the war, so too have the ethical and moral norms that govern the work of Ethiopian nationals in CSOs and academia. At the peak of the second phase of the Tigray war, Addis Ababa University (AAU) threatened to revoke the degrees of individuals, both in and outside of Ethiopia, who express support for TPLF. The statement by the University demonstrated the damage to academic freedom and the independence of the institution.⁹⁵ Pro-government and thus pro-war sentiments were ubiquitous in the CSO space, to a point where members of civil society who advocated conflict resolution, independent investigation, peaceful settlement of the conflict, and a national dialogue, and who lamented the human cost of the war, were viewed with suspicion, arrested, and labelled TPLF sympathisers .

On 6 September 2022, an attempt by a group of 35 local CSOs to release a joint statement calling for an end to the war in Tigray and other conflicts in Ethiopia was blocked by government security forces. Days after the incident, Alemu Sime, Minister for the Democracy Building Center' that is part of the Prime Minister's Office met with and warned representatives of CSOs that their calls for peace were wrong and the government would take action against those who failed to correct them. Alemu told the CSO representatives that the country was facing an existential threat and stressed that CSOs cannot play a neutral role in this war. He noted that calls for peace 'demoralise' the military and negatively affect the government's war mobilisation efforts.⁹⁶ The meeting took place against the backdrop of constant attacks on local CSOs by government and government-affiliated media as 'agents of the west', 'spies', and 'agents of imperialism'. Alemu warned that the government would not tolerate CSOs that 'conspire with the enemies of Ethiopia' to weaken and destroy the country. The impact of the crackdown and the legacy of the internal divisions among CSOs are hampering attempts to coordinate efforts towards government accountability.

⁹³ 'Why Ethiopia's "alphabet generation" feel betrayed by Abiy' (available at <https://www.bbc.co.uk/news/world-africa-57524513>).

⁹⁴ 'Ethiopia Votes, But Balloting Will Not Ease the Country's Deep Crisis' (available at <https://www.crisisgroup.org/africa/horn-africa/ethiopia/ethiopia-votes-balloting-will-not-ease-countrys-deep-crisis>).

⁹⁵ 'Addis Abeba University warns to take measures against graduate academics supporting TPLF; measures may include revocation of academic degrees' (available at <https://addisstandard.com/news-addis-abeba-university-warns-to-take-measures-against-graduate-academics-supporting-tplf-measures-may-include-revocation-of-academic-degrees/>).

⁹⁶ 'Ethiopian Minister warns representatives of local Civil Society Organizations for their recently issued "urgent call for peace"' (available at <https://umdmmedia.com/2022/09/ethiopian-minister-warns-representatives-of-local-civil-society-organizations-for-their-recently-issued-urgent-call-for-peace-statement/>).

Similar trends can be seen within the media, with the ongoing conflicts being used to justify suppression of freedom of the press. A week after the start of the Tigray war, the Office of the Prime Minister gathered the managing editors and owners of the major private media houses and announced that ‘business will not be as usual’. Media representatives were told they had to deliver their work with patriotism and civic duty, recognising the ‘existential threat the TPLF posed’ to Ethiopia. The weeks and months after that witnessed a major crackdown on the media, bloggers, and commentators resulting in the imprisonment of numerous journalists and bloggers.⁹⁷ Most of the private media supported the federal government’s war mobilisation efforts or applied strict self-censorship to prevent punishment. In May 2022, the crackdown was expanded with the arrest of another 11 journalists and media representatives. The Africa programme of the Committee to Protect Journalists, a US-based NGO that promotes press freedom around the world, said that ‘[w]ith the latest arrests of at least 11 journalists and media workers, it’s one step forward and three steps backward in Ethiopia and shows, yet again, that the government has no regard for press freedom and the right of citizens to information from a plurality of independent media sources’.⁹⁸

Foreign Policy and Regional Security

The start of the Tigray war in November 2020 radically altered the political and security dynamics in the Horn of Africa and affected Ethiopia’s regional and international reputation, image, and role. The magnitude and intensity of the conflict, which has seen the mobilisation of close to a million combatants, is not limited to Ethiopia. It is a regional war with full-scale participation and involvement of the Eritrean state and military, and increasing participation of elements within the governments of Sudan, the Gulf states, and other regional and international actors. The war has become the single most important issue shaping the political economy of the region and is altering the capacity and credibility of Ethiopia’s foreign ministry and defence forces, the two core institutions of Ethiopia’s foreign and regional security policy.

Ethiopia as a Regional Partner

For decades, Ethiopia’s foreign policy was rooted in its regional role. Ethiopia maintained a balance between strong security and development cooperation with the west, on one hand, and expanding economic relations with China and other middle and emerging powers, on the other. Ethiopia set the tone in the IGAD and the AU. It regularly represented Africa and the developing world at G20 and G7 summits and took leadership at numerous United Nations Climate Change Conferences (COP). Addis Ababa was defined by its multilateral diplomatic efforts. The reputation and influence that Ethiopia projected on the regional and global stage came from its contributions to the regional peace and security agenda through multilateral arrangements and frameworks. In 2011, Ethiopia was assigned to mediate between Sudan and South Sudan and contributed the

⁹⁷ ‘Detention of Journalists in Ethiopia Serves as Example of Deteriorating Media Freedom’ (available at <https://www.voanews.com/a/detention-of-journalists-in-ethiopia-serves-as-example-of-deteriorating-media-freedom/6512227.html>).

⁹⁸ ‘Ethiopian authorities arrest 11 employees of 4 independent media outlets’ (available at <https://cpj.org/2022/05/ethiopian-authorities-arrest-11-employees-of-4-independent-media-outlets/>).

entirety of the United Nations Interim Security Force for the Abyei region (UNISFA). Ethiopia also took a leading role in the African Union Mission to Somalia (AMISOM), led the IGAD mediation process to end the civil war in South Sudan, and co-sponsored United Nations sanctions with Djibouti against Eritrea for supporting Al-Shabaab. One of the biggest achievements of Ethiopia's foreign policy in the past decade and a half was securing the support of Khartoum for the controversial Great Ethiopian Renaissance Dam (GERD). The buy-in from Sudan added legitimacy to the project and emboldened Ethiopia's aspirations to become a energy and infrastructure hub and the centre of regional integration. Ethiopia's fast-growing economy, combined with a strong government and investments in poverty reduction, defined its image among development partners. The events of the past two years have significantly damaged Ethiopia's relations with its regional neighbours and with international development partners.

Deteriorating Relationship with Sudan

The peace and stability of the Horn of Africa strongly depends on relations between Ethiopia and Sudan. The two countries have a long history of supporting each other's rebel movements and waging proxy wars. Successive Ethiopian governments hosted and supported the Anyanya movement of South Sudanese resistance and its successor the Sudan People's Liberation Movement/Army (SPLM/A). The military regime in Sudan also hosted, trained, and armed the Eritrean Liberation Movement (ELM), Eritrean People's Liberation Front (EPLF), and the TPLF from the 1970s to beginning of the 1990s. Relations between the two governments improved at the end of the 1990s, and the following decade and a half witnessed relative stability in the region and improved economic, political, and security relations between Addis Ababa and Khartoum. In 2012, Sudan was the biggest African investor in Ethiopia. Sudan supported GERD and the two countries reached an understanding on the contested border. The 2007 agreement between President Omar al-Bashir and Prime Minister Meles Zenawi designated the contested Fashaga area as a location that could be utilised by both Ethiopian and Sudanese farmers until formal demarcations took place. The improved bilateral relations strengthened the IGAD and made Ethiopia a major security player in the region.

The border closure by the Sudanese government following the Tigray war reignited the border dispute between the two countries, further widening their disagreements on GERD, the management and reform of IGAD, and the role of external actors in regional peace and political processes.⁹⁹ The Sudanese army took control of the contested Fashaga area between Ethiopia and Sudan, allegedly expelling Ethiopian farmers from the fertile territory. Sudan stated that it was reclaiming its rightful territory and took action following the request from Addis Ababa to secure the border, while Addis Ababa accused the Sudanese military of taking advantage of the Tigray war to take unilateral measures to control Fashaga. The border crisis undermined the cohesion of the IGAD. Requests by Sudan, which replaced Ethiopia as IGAD chair in 2019, to mediate between Addis Ababa and Mekele were rejected by the Ethiopian government. The border dispute has widened emerging differences on GERD and has pushed Khartoum closer to Cairo. Ethiopia's poor relations with Sudan have also consolidated Egyptian influence and presence in the region

⁹⁹ 'Containing the Volatile Sudan-Ethiopia Border Dispute' (available at <https://www.crisisgroup.org/africa/horn-africa/ethiopia/b173-containing-volatile-sudan-ethiopia-border-dispute>).

and could further undermine multilateral security and economic arrangements.¹⁰⁰ In the past year and a half, Addis Ababa has also accused Khartoum of hosting, arming, and supporting the TPLF and insurgent groups in Benishangul-Gumuz,¹⁰¹ while Sudan has accused Ethiopia of supporting rebels in its troubled Blue Nile State.¹⁰²

Peacekeeping, arguably Ethiopia's most effective and successful foreign policy tool, has witnessed significant setbacks. There have been numerous reports of incidents between Tigrayan and non-Tigrayan members of the Ethiopian peacekeeping contingent in AMISOM and UNISOM resulting in standoffs.¹⁰³ Hundreds of Tigrayan members of the Ethiopian peacekeeping contingent in Sudan, South Sudan, and Somalia refused to return to Ethiopia.¹⁰⁴ Worsening relations with Sudan, and the security partnership with Eritrea, resulted in Ethiopia being asked to withdraw its peacekeeping force.¹⁰⁵ The resumption of the Tigray war in August 2022 further worsened relations between Addis Ababa and Khartoum. In August 2022, the Ethiopian government claimed to have shot down a cargo aircraft that had violated Ethiopian air space while allegedly attempting to supply arms to Tigray. PM Abiy Ahmed stated that numerous flights had taken place to supply arms using the same route.¹⁰⁶ In September 2022, former members of the Ethiopian United Nations peacekeeping contingent were accused of entering the conflict from Sudanese soil.¹⁰⁷

Eritrea's Increased Influence on Ethiopian Politics and Security

The full involvement of the Eritrean government and its being implicated in human rights violations in the Tigray war have effectively regionalised the conflict.¹⁰⁸ In September 2022 the Eritrean government called for a total mobilisation.¹⁰⁹ Eritrean soldiers are accused of having

¹⁰⁰ 'Egyptian, Sudanese armies launch first-of-their-kind joint exercises' (available at <https://www.arabnews.com/node/1951836/middle-east>).

¹⁰¹ 'Sudan denies Ethiopian accusations of supporting rebel forces' (available at http://www.xinhuanet.com/english/2021-12/13/c_1310368573.htm).

¹⁰² 'Khartoum Accuses Ethiopia of Arming Rebels' (available at <https://allafrica.com/stories/202103120120.html>).

¹⁰³ 'Ethiopia says disarms Tigrayan peacekeepers in Somalia over security' (available at <https://www.reuters.com/article/ethiopia-conflict-somalia-exclusive-idUSKBN27Y1HF>).

¹⁰⁴ '528 Tigrayan peacekeepers in Abyei refuse to return to Ethiopia' (available at <https://sudantribune.com/article257982/>).

¹⁰⁵ 'UN to withdraw Ethiopian peacekeeping force on Sudan's request: Khartoum' (available at <https://english.alarabiya.net/News/middle-east/2021/08/24/UN-to-withdraw-Ethiopian-peacekeeping-force-on-Sudan-s-request-Khartoum>).

¹⁰⁶ 'Ethiopia Says It Downed Arms-Laden Plane Crossing From Sudan' (available at <https://www.bloomberg.com/news/articles/2022-08-24/ethiopia-says-arms-laden-plane-from-sudan-shot-down-ebc-reports>).

¹⁰⁷ 'Ex-UN Peacekeepers Battle for Control of Key Ethiopian Town', (available at <https://www.bloomberg.com/news/articles/2022-09-02/ex-un-peacekeepers-battle-for-control-of-key-ethiopian-town?leadSource=verify%20wall>).

¹⁰⁸ 'Eritrea's involvement in Tigray could backfire' (available at <https://blogs.lse.ac.uk/africaatlse/2022/01/31/eritreas-involvement-in-tigray-could-backfire-tplf-conflict/>).

¹⁰⁹ 'Eritrea issues army mobilisation call as Ethiopia fighting resumes, Canada says', (available at <https://www.reuters.com/world/eritrea-issues-army-mobilisation-call-ethiopia-fighting-resumes-canadian-2022-09-17/>).

attacked Eritrean refugees in UNHCR camps in Tigray region.¹¹⁰ The full return of Eritrea to the conflict has emboldened Eritrea's role in Ethiopia's politics and regional security policy. Eritrea has been highly critical of IGAD and existing multilateral cooperation platforms. The increased influence and involvement of the Eritrean army in the Tigray conflict and broader Ethiopian political and security space could further undermine IGAD's possible role and multilateral efforts to end the war. Rising tensions between Addis Ababa and Khartoum, and between Asmara and Khartoum, have returned the region to the security and diplomatic complexities of the 1990s, with significant potential for escalation.

Ethiopia is increasingly outsourcing and delegating its security to Eritrea. Reports indicate that the Ethiopian military has moved sections of its forces to Eritrea, allegedly under the command of Eritrean army leadership. These trends are increasing the security dependence of the Ethiopian state on Eritrea, legitimising Eritrea's role in the war, and emboldening its government's influence. Beyond its support in the Tigray war, Eritrea is considered a key regional player that is vital for Ethiopian geopolitical interests. Eritrea has tried to mediate between Ethiopia and Sudan on the Fashaga border conflict, and between Ethiopia and Egypt on GERD.¹¹¹ There are concerns in Addis that a falling out with Eritrea could result in a possible Cairo-Khartoum-Asmara alliance against Addis. Such an alliance could significantly increase Ethiopia's regional vulnerability. With a recent history of hosting and supporting groups fighting to overthrow the Ethiopian government, including the Ginbot 7, the OLF, and the ONLF, the Ethiopian government also fears Asmara could reactivate its proxy war if relations worsen. Eritrea's cooperation with the Amhara regional security forces and the Fano, which has been legitimised by the war in Tigray, adds another layer of concern shaping Addis–Asmara relations.

International Partners

With its strategic location in the Horn of Africa and its role in African politics and security, many international partners see Ethiopia as a gateway to the African continent. The ongoing conflicts have badly strained Ethiopia's relations with the US¹¹² and the EU, and have led to increased diplomatic, military, and security cooperation by Ethiopia with other middle and emerging powers. Overall, the conflict could significantly shift the centre of gravity of Ethiopia's foreign policy in favour of illiberal democracies and authoritarian regimes.

In light of the current situation, Addis Ababa appears to be adopting an increasingly transactional foreign policy, focused on satisfying its immediate needs for economic assistance and military support. The United Arab Emirates (UAE), Saudi Arabia, Turkey, China, and Iran have provided Addis Ababa with drones, surveillance technologies, and weapons and ammunition needed for the

¹¹⁰ 'Attacks on Eritrean refugees in Tigray "clear war crimes": HRW' (available at <https://www.aljazeera.com/news/2021/9/16/ethiopia-attacks-eritrean-refugees-tigray-war-crimes-hrw>).

¹¹¹ 'Eritrean president visits Sudan for dam mediation' (available at <https://www.aa.com.tr/en/africa/eritrean-president-visits-sudan-for-dam-mediation/2229207>).

¹¹² 'US concerned over Iran, Turkey, UAE-supplied drones in Ethiopia war' (available at <https://www.al-monitor.com/originals/2021/12/intel-us-concerned-over-iran-turkey-uae-supplied-drones-ethiopia-war#ixzz7fnXihbPq>).

war in Tigray and fighting the insurgency in Oromia.¹¹³ The past two years have also seen boosted security relations and arms trade with Russia.¹¹⁴ The constant support Ethiopia has received from Russia and China at the United Nations Security Council, and the strong anti-western rhetoric by the Ethiopian state media, have radically altered the political and public discourses in Addis Ababa.

Ethiopia's relationships with multilateral institutions and mechanisms continue to suffer because of the ongoing conflicts. The Ethiopian government has rejected international criticisms of its conduct of the Tigray war, labelling some of it a part of a 'neo-colonialist' and 'imperialist' agenda.¹¹⁵ On 30 September 2021, the Ethiopian government expelled seven high-level officials of the United Nations Ethiopia office. The statement by the Ethiopian government declared the United Nation staff persona non-grata and demanded they leave the country. United Nation Secretary-General António Guterres described the decision as an 'unprecedented expulsion'.¹¹⁶ The government rejected requests for independent investigations of potential human rights violations, citing its desire to find 'African Solutions to African Problems'. However, the Ethiopian government also rejected an initiative by the African Commission on Human and Peoples' Rights (ACHPR), a quasi-judicial autonomous treaty body of the African Union, to investigate the human rights violations in Tigray.¹¹⁷ The response to the ACHPR initiative weakened Ethiopia's position in the AU.¹¹⁸ The controversy surrounding the re-election of the Director-General of the World Health Organization, Tedros Adhanom, also added to the diplomatic crisis: Tedros, who is a former Ethiopian Foreign Minister and a former member of the TPLF leadership, was accused by the Ethiopian government of supporting the Tigray regional administration. Efforts by Addis Ababa to block his re-election have damaged Ethiopia's standing within the United Nations system and have likely reduced the scope for Ethiopians to take on leadership roles within the United Nations system and other international organisations.¹¹⁹

The narrowing of political and public spaces in Ethiopia is also affecting diplomats in Addis Ababa. In September 2022, the Ethiopian Ministry of Foreign Affairs circulated a memo requiring diplomatic and consular missions in Addis Ababa to inform the Ministry about any meetings they are planning to organise, either on their own premises or elsewhere. The Ministry justified the decision by reference to the security situation, indicating that '[t]his measure concerns the discharge of its [Foreign Ministry] protection responsibilities to guarantee the safety and security

¹¹³ 'UAE air bridge provides military support to Ethiopia gov't' (available at

<https://www.aljazeera.com/news/2021/11/25/uae-air-bridge-provides-military-support-to-ethiopia-govt>).

¹¹⁴ 'Russia's Africa moves force Europe rethink on Ethiopia' (available at <https://www.politico.eu/article/europe-russia-ethiopia-rethink/>).

¹¹⁵ 'Pan Africanism in the Fight against Neocolonialism' (available at <https://www.ena.et/en/?p=31034>).

¹¹⁶ 'Guterres criticizes "unprecedented expulsion" of staff from Ethiopia; calls for focus on saving lives' (available at <https://news.un.org/en/story/2021/10/1102352>).

¹¹⁷ 'Ethiopia calls on AU to stop commission of inquiry on rights abuse in Tigray says outside scoop of agreement, lacks legal basis' (available at <https://addisstandard.com/news-ethiopia-calls-on-au-to-stop-commission-of-inquiry-on-rights-abuse-in-tigray-says-outside-scoop-of-agreement-lacks-legal-basis/>).

¹¹⁸ In addition to hosting the AU administrative headquarters in Addis Ababa, Ethiopia has taken a leading role in key projects of the AU, e.g. the formulation of the normative framework and institutional operationalisation of the African Peace and Security Architecture (APSA) and the Africa Governance Architecture (AGA).

¹¹⁹ 'Ethiopia withdraws support for WHO boss for "backing" TPLF' (available at <https://www.theeastafrican.co.ke/tea/rest-of-africa/ethiopia-withdraws-support-who-boss-3682130>).

of diplomatic and consular staff and premises in the country'.¹²⁰ The decision is likely to reduce the interactions of diplomats with Ethiopia's political opposition, the media, CSOs, and the general public, as many Ethiopians will likely not be comfortable with their names being reported to the government. The strong anti-western rhetoric espoused by the state media has already created a climate of fear among local organisations and local staff working with embassies, international organisations, NGOs, and human rights groups.

¹²⁰ 'Ministry demands missions for disclosure of event details over security concerns' (available at <https://www.thereporterethiopia.com/26305/>).

Conclusion: Towards a Multifaceted Understanding of Impacts, and Next Steps

Ethiopia's internal conflicts between 2020 and 2022 – the war in Tigray, the insurgency in Oromia, and the proliferation of communal clashes across the country – have caused significant humanitarian and economic losses, have radically redefined state–society relations, and have re-shaped Ethiopia's position in the region and the world. The polarisation of the political and social spaces is damaging the cultural and institutional foundations of the state and society. The repression of dissent and free speech justified by the war has eliminated spaces to debate independently the causes, courses, and consequences of the conflict, and to search for an inclusive solution. Elite fragmentation and ideological and political divisions have widened divisions on understandings of history, identity, and nation-building, negatively affecting the national dialogue process.

The war in Tigray has both exposed and embodied the deep fault lines and contradictions underlying the Ethiopian state and society. It remains a complex conflict where historical, structural, and contemporary drivers of conflict merge and have resulted in an unprecedented security crisis, humanitarian disaster, economic setback, and political challenge. The war has securitised and militarised the public and political spheres beyond Tigray – further complicating state–society and intercommunal relations in other parts of the country.

While this paper has reviewed the costs to Ethiopia of the ongoing conflict in various separate domains, it is clear that the impacts are deeply intertwined and overlapping. The Pretoria peace deal in November 2022 is a first step to addressing these impacts, but sustained recovery and peace will require a comprehensive and inclusive approach. Societal and security stabilisation will also require economic stabilisation. With the state's monopoly on the legitimate use of violence undermined, balancing a quest for stability with reinstating democratic and accountability processes will be critically important. With the social fabric of society badly damaged, steps to drive constructive debate and potential reconciliation of opposing views will be required to ensure longer-term stability.