

Emerging Market Perspectives on Business and Human Rights Measures and Economic Development

How are business and human rights measures experienced in supply chains and what increases positive impacts while minimising unintended consequences?



Who is it for?

This report is intended for all stakeholders who work with Business and Human Rights (BHR) measures or with the issues connected to them. This includes regulations and frameworks encompassing human rights and modern slavery, or standards and certifications which might be linked to regulations or the UN Guiding Principles on Business and Human Rights (UNGPs) and Sustainable Development Goals (SDGs).

It will be of particular interest to policy makers, companies and investors in both western markets and Emerging Markets and Developing Economies (EMDEs), government donors, industry bodies, business organisations and academia.

The report draws on perspectives from stakeholders in EMDEs to help better understand how BHR measures are experienced, the positive impacts and challenges of these requirements to-date, and the unintended consequences of implementation.

The report concludes with recommendations from EMDE stakeholders about how BHR measures can be implemented in ways that are fit-for-purpose in the local cultural context, and which can more quickly and effectively achieve positive BHR outcomes. It does not make any assessment or judgement of policies being implemented by different countries and legislatures but is intended to help implementers consider mitigations to any unintended consequences in order to help achieve the optimum human rights and economic development outcomes.

Contents

Executive summary	5
Background	12
Purpose of the research	16
Methodology	18
Case study countries	20
Kenya	21
Ghana	22
Democratic Republic of Congo	23
Key findings	24
Recommendations	40
Appendices	52
Endnotes	53

FiftyEight

About the research

This research was commissioned by the UK Government and delivered collaboratively by FiftyEight and our local research partners, Partner Africa in Kenya and Ghana, and River Inc in DRC.



We are grateful for the expertise and dedication of everyone who has taken part in and given feedback on the research.

For any questions or follow up on the research, please contact research@fiftyeight.io. The executive summary and full report can be accessed at www.fiftyeight.io/research.

Executive summary

Business and Human Rights (BHR) measures for companies and investors have developed significantly over the last few years, from voluntary principles to mandatory regulations - to varying degrees in different contexts. In parallel, donor approaches to inclusive economic development have evolved towards greater emphasis on the role of business, market access and investment in emerging economies to create decent jobs, livelihoods and growth. Both have the potential to promote the realisation of Sustainable Development Goal (SDG) 8: to promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

BHR regulations aim at raising standards, through means such as excluding imports or placing responsibilities on companies to ensure that BHR principles are upheld across the supply chain. BHR voluntary standards seek to encourage changes to business behaviour, and provide positive choices for consumers, businesses, government procurement and investment markets. Together, such measures underpin efforts to identify, prevent, mitigate, and remediate human rights abuses, while many also seek to enable businesses to have a positive impact on jobs and livelihoods, families and communities throughout value chains.

Intersecting factors can create barriers to achieving positive human rights and development outcomes through BHR measures – especially in Emerging Markets and Developing Economies (EMDEs). The nature of global commodity value chains creates challenges for cascading BHR measures to all levels of the supply chain, as well as for transparency and traceability efforts to monitor their implementation.

This is particularly the case where informal sectors form large parts of the national economy and/or where their place in supply chains is unclear. This makes it especially difficult to detect or address human rights abuses. Sub-Saharan Africa has the largest share (85 per cent) of the population engaged in informal labour¹, with informal cross-border trade accounting for 30-40 per cent of trade in the region.² This creates clear challenges for adhering to BHR measures, leading to reduced chances of securing critical access to global markets. Lost market opportunities can result in lower incomes, contributing to cycles of poverty, cultural norms and a lack of access to quality education which all increase vulnerability to human rights abuses and violations, including modern slavery and the worst forms of child labour.

The impacts, complexities and unintended consequences of BHR measures are best understood from the perspective of those most affected by them. This research sought to identify how the implementation of BHR measures are experienced in EMDEs through a series of firsthand accounts.

Business and Human Rights (BHR) measures

BHR measures include regulations, frameworks, standards, certifications, auditing and more. For example:

- **Regulations:** Laws designed to protect workers from business and human rights abuses, ensure due diligence in supply chains, or provide transparency on modern slavery or child labour risks
- **Frameworks:** Guiding principles and recommendations for businesses, governments and others, including the UN Guiding Principles on Business and Human Rights, ILO Fundamental Principles and Rights at Work, OECD Guidelines for Multinational Enterprises on Responsible Business Conduct and the Ethical Trading Initiative Base Code (these frameworks and standards also shape other BHR measures)
- **Certifications and Auditing:** Designations such as Fairtrade, Rainforest Alliance, Sedex, company specific audits and trading terms

The term 'requirements' was commonly used as a catch-all phrase by participants in this research as although many standards and other BHR measures are voluntary, they are still experienced as mandatory by exporting businesses in Emerging Markets and Developing Economies (EMDEs) due to their critical dependence on access to the markets that are demanding these standards.



“Taking a bottom-up view of the value chain helps identify and enable country and sector-specific strategies for BHR outcomes in ways which are realistic in terms of cost, practical implementation and data availability in the local cultural context.”

TRADE REPRESENTATIVE, GHANA

The research involved consultations with 118 individuals in Kenya, Ghana and the Democratic Republic of the Congo (DRC). These individuals represent a broad range of stakeholders including producers and suppliers, processing companies, traders, industry organisations, investors, community organisations, civil society, local government and trade unions. Findings from the DRC build on existing research from the four year [Partnership Against Child Exploitation \(PACE\) programme](#).



“Why are people in Europe asking for this to be done? What is the context? Because it feels like you are wanting to destroy our industry.”

TRADE REPRESENTATIVE, GHANA

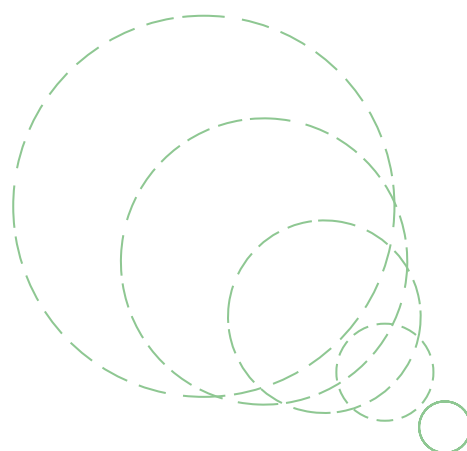


“If you look at all of these requirements and their evolution, and if they were implemented today in the way they were designed, the impact on our local economy would be huge and detrimental.”

INDUSTRY ORGANISATION, GHANA

For most participants, taking part in this research was the first time they had been asked about their experience of implementing BHR measures, as well as their perspective on what is working or not from efforts to-date. Stakeholder perspectives are increasingly drawn upon in the development of BHR measures (such as the EU Corporate Sustainability Due Diligence Directive or CSDDD) in order to try to ensure they are fit for purpose and avoid unintended consequences. However, the research found a need for a stronger bottom-up approach to creating and implementing BHR measures. Regulations have been criticised due to power imbalances in the supply chain between the top and the bottom as well as between buying and production countries. For example, while there is an inherent expectation in regulations that buyers, donors and governments in regulated markets should bear most of the responsibility for resourcing implementation of BHR measures, much of the resource burden ultimately falls to EMDE companies and other upstream stakeholders.

In many contexts, the research produced evidence that BHR measures do lead to greater respect for human rights. In DRC, for example, BHR traceability measures have contributed to reducing conflict at some mineral sites and have, to some extent, helped reduce the presence of children working on dangerous tasks. The research went beyond this, however, to obtain views on the balance between positive impacts, challenges and unintended consequences – for example in DRC where alongside desired outcomes, unintended consequences for jobs and livelihoods were also clearly highlighted. The experiences reported, and the recommendations made are invaluable for development and implementation of new BHR measures, guidance, interventions and future policy development.



Key findings:

What do companies, investors, government officials and civil society in EMDEs say about BHR measures?

What is the level of awareness of BHR measures?

41% of participants reported not being aware of any BHR regulation, whereas 100% of participants mentioned at least one standard or certification.

- **Awareness of BHR certifications and standards is greater than for BHR regulations** although overall awareness varies across regions and sectors.
- **ESG (Environmental, Social, Governance) requirements help increase awareness** of BHR measures due to their link with access to finance.

What are the positive impacts of BHR measures?

100% of participants in Kenya and Ghana reported a positive impact from implementing BHR measures, whereas it was only 30% of participants in DRC.

- **Increased access to new markets, buyers and investors**, results from the implementation of BHR measures that are no longer viewed as needed “just to comply”, but as critical to operations and market access.
- **Improved worker safety, well-being and productivity** is a key benefit of implementing BHR measures. Increased productivity was reported through consistent working hours and enforcement of rest hours, fair wages, environmental standards, access to maternity leave and health and safety improvements.
- **Enhanced relationships and industry involvement** including more direct relationships between producers and buyers were a key outcome of implementing BHR measures. BHR measures can ensure social inclusion as farmers feel part of an industry that values their views and contributions.
- **Increased measurement of BHR impacts**, particularly on behalf of international buyers. Some interviewees reported collecting data on labour standards, farming practices and rights of children – however there are significant challenges to achieving this at scale.
- **Increased knowledge and capacity** from industry and government support, as well as support from buyers, donor funded programmes and other NGO activities. Programmes providing training on specific BHR issues, implementation support, and advice on how to obtain and share data have also been made available.



“[BHR measures] have helped us access the global market. The positive impact has been at all of the levels of production and export, which has helped us deliver a safe and accurate product to our buyer.”

SME OWNER, KENYA



“Regulation not linked to business and human rights, i.e. the EUDR, is perceived to have potential positive impacts on traceability in supply chains, with the potential to enhance business and human rights activities as a result.”

TRADE POLICY ADVISOR, DRC



“Workers being able to flag issues through grievance mechanisms allows us to address risks before they become crises.”

PRODUCER, KENYA

What challenges in implementing BHR measures were reported?

100% of participants reported challenges in implementing BHR measures.



- **Expectations of BHR measures may not always align with local culture and local value chain realities**, particularly in the context of a high degree of informality across different sectors or where children are involved in work from a young age.
- **Lack of preparedness and resources to comply or demonstrate compliance** is felt by EMDE companies of all sizes, but acutely by smallholders in particular, who may be either willing to comply but lack the resources to do so, or are compliant but lack the time, resources or knowledge to show this. For local companies, a sense of BHR measures overload contributes to worry about the growing number of due diligence requirements.
- **The cost of compliance with BHR measures** relative to priorities of production and getting products to market is a concern, particularly in the face of investor pressures to achieve high productivity whilst keeping costs as low as possible. Local companies feel a lack of support for covering the costs of implementation across all sectors, which is further exacerbated by power imbalances in supply chains.
- **BHR measures and data requirements are created from a developed economy mindset**, which leads to data requests and standards that are based on a “western perspective” of what data is available. Participants highlighted that the realities of data availability and consistency in many EMDE contexts is generally at direct odds with BHR measure requirements, resulting in a mismatch between the demands of BHR measures, the capacity to understand and report meaningfully, and the data ultimately provided.
- **Misalignment between local laws, BHR measures, and highly regulated environments** adds complexity to ensuring compliance. This can result from the way local authorities interpret global requirements as needing a highly regulated environment to try to ensure BHR standards and compliance. The challenge of implementing BHR measures is further exacerbated in fragile contexts, including armed conflicts, cartel control, and population displacement.



“Fixed working hours with fixed breaks, which we had to implement to comply with the requirements, led us to lose Muslim workers who could not take breaks to pray throughout the day. For many of our female workers, they could not come to the site unless their children could come with them or be close by.”

MANUFACTURER, GHANA



“You are more likely to see due diligence in place if you are supplying to a big named organisation. Most companies are already contending with challenging national regulatory environments.”

TRADE SUPPORT INITIATIVE, KENYA



“Regulations and standards at times feel very difficult to implement and comply with in practice — because when legislation is developed it is top down, without much input from local stakeholders. Legislation needs to be much more practically implementable.”

PRODUCER, KENYA



“We have had some long-term partnerships [with buyers] and they provide training and support CSR activities, but 90 per cent of the cost is left to us, the producer, and the best way they can support us is if they increase the price of the stem.”

PRODUCER, KENYA

What are the unintended consequences of BHR regulations or other measures?

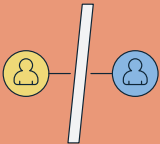
97% of participants reported unintended consequences arising from BHR measures.



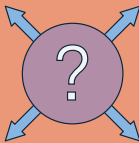
- **Jobs are at risk where EMDE companies are unable to resolve compliance issues**, particularly in complex, sensitive areas such as traceability requirements for minerals that present high levels of risk to supply chains in conflict settings. European Deforestation Regulation (EUDR) requirements were particularly highlighted as having potential to exclude EMDE smallholders from participating in EU markets.



- **Compliance over outcomes is a real risk** where BHR measures are implemented to the 'letter of the law' rather than identifying the best way to achieve BHR outcomes in-line with the local context. The resulting disruption to local practices and cultural norms presents a further risk for loss of employment or job market access, and can at times increase negative BHR outcomes.



- **EMDE companies acutely fear disengagement by developed economy buyers** where they struggle to meet or demonstrate compliance with BHR measures. This arises where a lack of communication between local producers and international buyers results in different understandings of how compliance challenges are approached and responded to by buyers.



- **Supply chain resilience can be affected** where the cost of compliance and disruption to productivity from BHR measures leads to EMDE products becoming less competitive in global markets. EMDE companies may then shift towards other markets that do not have the same BHR requirements, again potentially affecting job security and economic opportunities.



- **Donor dependency by EMDE markets and companies** for continued compliance with ever-evolving BHR measures can lead to reduced decision-making power and autonomy, potentially stifling innovation and growth.



“Ensuring compliance with certification is expensive. We are prevented from increasing costs to cover this as we will lose customers, but at the same time are required to pay for audits and prove compliance with human rights standards.”

PRODUCER, KENYA



“We prioritise ensuring we are not at risk of being found non-compliant, rather than building systems that comply with certifications and at the same time support female workers in the local context. The risk of losing business is too high.”

MANUFACTURER, GHANA

Recommendations

The voices of stakeholders who are at the furthest reaches of global supply chains, including workers, local communities, and small businesses provide hard hitting recommendations. They focus on how to ensure positive outcomes and mitigate unintended consequences from measures in EMDEs, and for all stakeholders throughout the value chain – investors, buyers, governments and workers alike.

Taking a bottom-up view of the value chain helps identify and enable country and sector-specific strategies for BHR outcomes in ways which are realistic in terms of cost, practical implementation and data availability in the local cultural context.

This should help deliver a balanced approach to achieving SDG 8: optimising effective market investment and regulatory levers towards improved business standards; sustainably building local capacity to meet the human rights requirements of export market businesses; raising job and livelihood standards for the most vulnerable through investment and increasing export market participation; and reducing the pressures to follow riskier routes and options.

Sixteen recommendations are made in five groups:

- BHR regulations;
- Contracting and pricing;
- Traceability;
- Capacity sharing; and
- Collaboration.



“Ideally, national laws or industry-level policies and frameworks would be created which are easily implementable and which commit all players to a level playing field – but which are grounded in local context and realities. If these requirements can be agreed at the national level, and local governments can agree laws which are aligned to EU or other global regulations this would make alignment and support of local businesses more effective.”

PRODUCER, KENYA



Recommendations for BHR regulations, policies, laws and standards



1. Conduct bottom-up impact assessments of BHR regulations to evaluate their feasibility and potential consequences at a national sector level.
2. Involve stakeholders from EMDEs in the design and implementation of regulations and other BHR measures.
3. Strengthen and align local laws with global standards, including through the development of National Action Plans.
4. Incorporate local cultural contexts and value chain complexities into EMDE national legislation and guidance, with particular focus on groups at heightened risk of vulnerability and marginalisation.

Recommendations for contracting and pricing



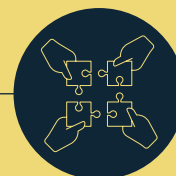
5. Prioritise EMDE company and buyer dialogue and engagement over disengagement on issues of compliance, contracting and pricing.
6. Address power imbalances in supply chains by explicitly recognising a principle of equal supplier-buyer partnership in BHR arrangements.
7. Support the development of direct relationships between buyers and suppliers in emerging markets to enhance transparency and reduce reliance on intermediaries.

Recommendations for traceability, monitoring and evaluation



8. Assess supply chain risk in the context of collaborative sector, commodity or geography focused initiatives in order to share learning and speed up progress towards outcomes.
9. Develop innovative ways to ease the burden of proof for businesses adhering to due diligence and other BHR measures, linked to processes that enhance productivity.
10. Reward EMDE companies for achieving positive outcomes, potentially through preferential market access, longer-term contracts, or pricing that reflects these outcomes.
11. Engage with ESG data providers and benchmarks to balance ratings for better incorporation of BHR outcomes.

Recommendations for capacity sharing and support



12. Promote initiatives that remove structural barriers to workers and communities in EMDEs participating in global markets.
13. Support locally sustainable, disruptive innovations that enable positive BHR outcomes in global value chains.
14. Provide direct financial and technical support to EMDE companies, particularly SMEs, but with a clear capacity trajectory and exit strategy to prevent long-term donor reliance.

Recommendations for collaboration



15. Foster collaboration and dialogue that openly recognises the unintended consequences of BHR measures between stakeholders at all levels of the value chain.
16. Encourage investments by both developed economy and EMDE investors that prioritise BHR and draw on consultation with investee companies, governments

Background

Business and Human Rights (BHR) measures for companies and investors have developed significantly over the last few years, from voluntary principles to mandatory regulations – to varying degrees in different contexts. In parallel, donor approaches to inclusive economic development have evolved towards greater emphasis on the role of business, market access and investment in emerging economies to create decent jobs, livelihoods and growth. Both have the potential to promote realisation of Sustainable Development Goal (SDG) 8: to promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

BHR regulations aim at raising standards, through means such as excluding imports or placing responsibilities on companies to ensure that BHR principles are upheld across the supply chain. BHR voluntary standards, including BHR frameworks, certifications and auditing, seek to encourage changes to business behaviour, and provide positive choices for consumers, businesses, government procurement and investment markets. Together, such measures underpin efforts to identify, prevent, mitigate, and remediate human rights abuses, while many also seek to enable businesses to have a positive impact on jobs and livelihoods, families and communities throughout value chains.

Business and Human Rights (BHR) measures

BHR measures include regulations, frameworks, standards, certifications, auditing and more. For example:

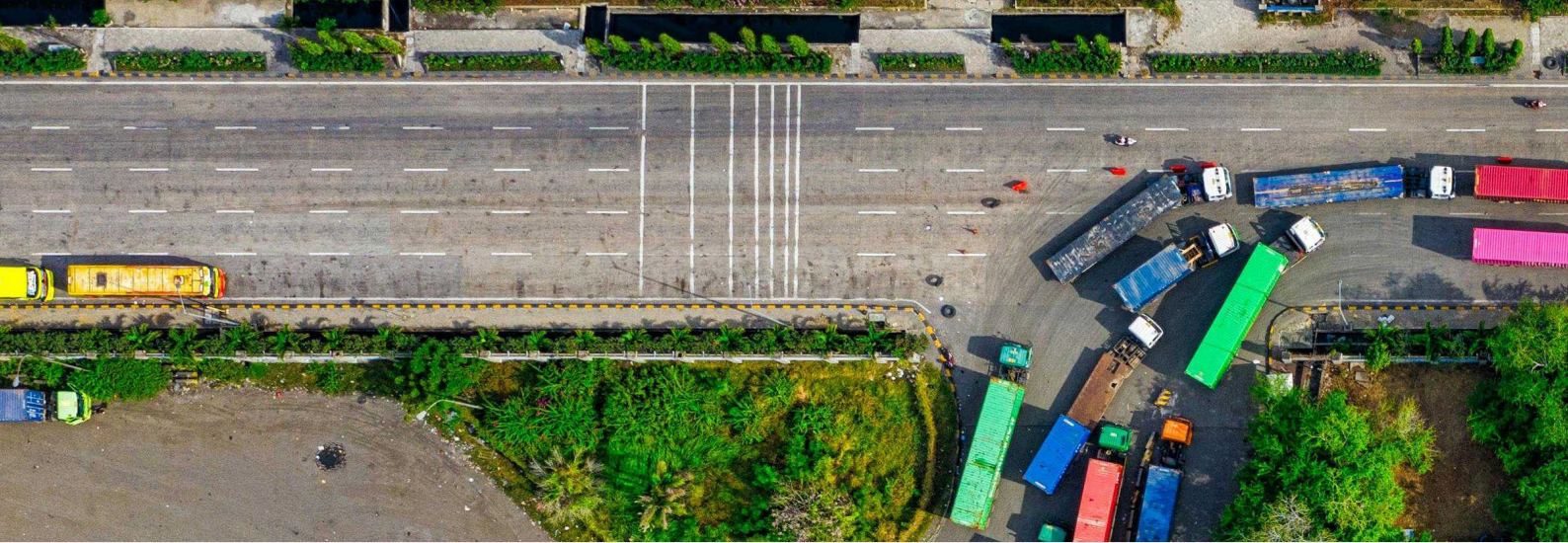
- **Regulations:** Laws designed to protect workers from business and human rights abuses, ensure due diligence in supply chains, or provide transparency on modern slavery or child labour risks
- **Frameworks:** Guiding principles and recommendations for businesses, governments and others, including the UN Guiding Principles on Business and Human Rights, ILO Fundamental Principles and Rights at Work, OECD Guidelines for Multinational Enterprises on Responsible Business Conduct and the Ethical Trading Initiative Base Code (these frameworks and standards also shape other BHR measures)
- **Certifications and Auditing:** Designations such as Fairtrade, Rainforest Alliance, Sedex, company specific audits and trading terms

The term 'requirements' was commonly used as a catch-all phrase by participants in this research as although many standards and other BHR measures are voluntary, they are still experienced as mandatory by exporting businesses in Emerging Markets and Developing Economies (EMDEs) due to their critical dependence on access to the markets that are demanding these standards.

There is a growing recognition of the role that States, businesses, other private sector actors, and civil society have to play in helping achieve these common ambitions. Their role is supported by frameworks like the UN Guiding Principles on Business and Human Rights (UNGPs), the ILO Fundamental Principles and Rights at Work (ILO Fundamentals) and the OECD Guidelines for Multinational Enterprises on Responsible Business Conduct (OECD Guidelines) which have helped set the tone for the responsibilities of States and businesses in evolving regulations.

The UNGPs were introduced in 2011 as the result of several decades of UN efforts to create global human rights standards for businesses. They define the duty of States and responsibility of businesses to protect human rights and provide effective access to remedy for business related human rights abuses. These principles were further developed into the OECD Guidelines, an international standard for how companies and investors should address their impacts on people, the planet and society. The Guidelines cover all key areas of business responsibility, including human rights, labour rights, environment, bribery, consumer interests, disclosure, science and technology, competition, and taxation.



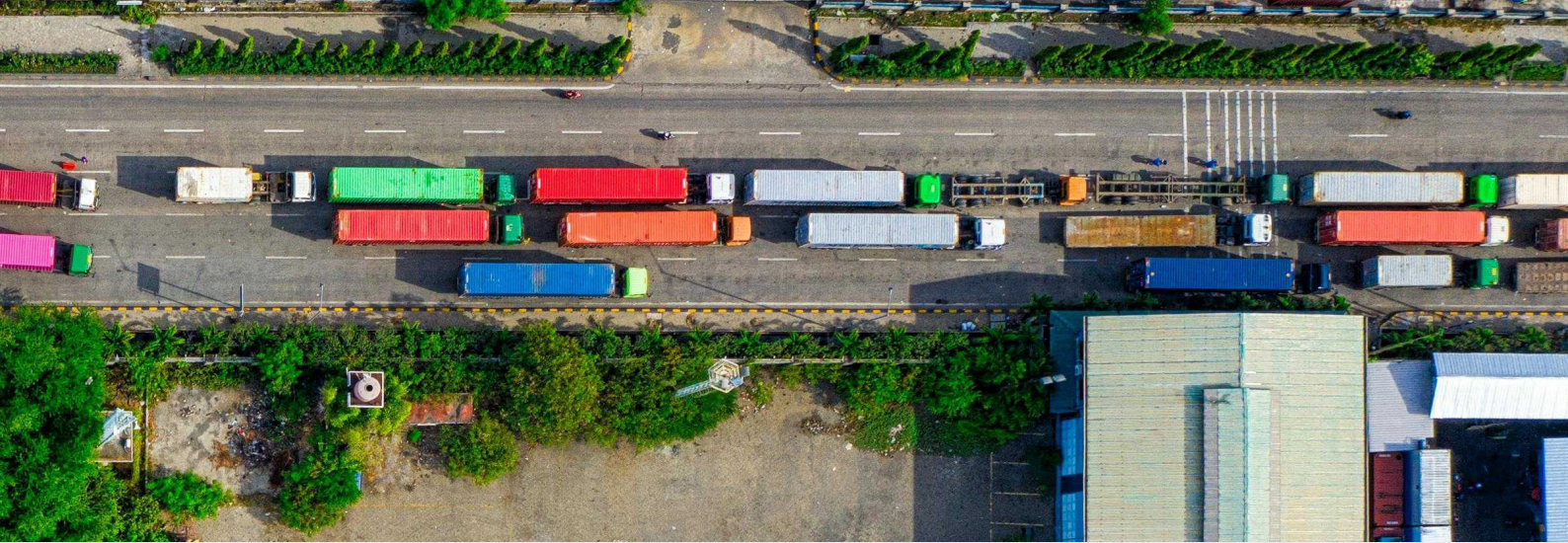


The ILO Fundamentals were first adopted in 1998 and amended in 2022 as an expression of commitment by governments, employers' and workers' organisations to uphold basic human values including freedom of association and collective bargaining, the elimination of all forms of forced labour or compulsory labour, discrimination in respect of employment, the effective abolition of child labour and ensuring a safe and healthy working environment.

Building on these principles, the landscape of social reporting requirements and standards has shifted significantly over the last few years, with increasing certifications, Environmental, Social, Governance (ESG) frameworks, and other trade policies. This movement has included an accelerating shift from voluntary to mandatory principles – with regulations such as Mandatory Human Rights Due Diligence (MHRDD), Forced Labour Trade Import Bans and Modern Slavery Reporting all being implemented to help improve working conditions in global supply chains and provide a level playing field for companies. The UK Modern Slavery Act 2015 played an important role in helping change both the context of the conversation on forced labour, human trafficking and child labour in supply chains, as well as action by companies to assess risk and report on their progress. It built on California's Transparency in Supply Chains regulation with a national UK requirement that applied to a wide range of companies in both their operations and supply chains.

The European Corporate Sustainability Reporting Directive (CSRD), Corporate Sustainability Due Diligence Directive (CSDDD), and Forced Labour Regulation (FLR) will drive new levels of risk assessment, transparency and responsibility for companies, along with data and reporting for investors and other stakeholders. CSRD requires companies to disclose impacts on people and the environment, as well as financial risks and opportunities. CSDDD establishes an obligation to conduct due diligence, i.e. to identify, assess and account for how companies address (prevent, mitigate or remediate) adverse impacts. The FLR's objective will empower the EU to prohibit or remove a product from the single market if it is shown to involve forced labour, regardless of whether it is produced, imported to or exported from the EU. In 2022, the US put in place the Uyghur Forced Labour Prevention Act (UFLPA) which prohibits the importation of goods mined, produced, or manufactured wholly or in part in Xinjiang. Other countries have also recently developed forced labour import restrictions, such as Canada and Mexico as part of the 2020 North American trade agreement.

For emerging regulatory measures like CSDDD, the Directive also sets out expectations for the European Commission and for Member States (both EU and non-EU) with a view to facilitate compliance. In practice, the EU Commission will issue general and sector-specific guidelines, including on risk factors; how to conduct due diligence effectively; modern contract clauses; fitness criteria and methodology for assessment; data and information sources as well as digital tools.



Stakeholder perspectives are increasingly drawn upon in the development of BHR measures (such as CSDDD) in order to try to ensure they are fit for purpose and avoid unintended consequences. However, there needs to be a stronger bottom-up approach to creating and implementing BHR measures. Regulations have been criticised due to power imbalances in the supply chain between the top and the bottom as well as between buying and production countries. For example, while there is an inherent expectation in regulations that buyers, donors and governments in regulated markets should bear most of the responsibility for resourcing implementation of BHR measures, much of the resource burden ultimately falls to EMDE companies and other upstream stakeholders.

Intersecting factors can create barriers to achieving positive human rights and development outcomes through BHR measures – especially in EMDEs. The nature of global commodity value chains creates challenges for cascading BHR measures to all levels of the supply chain, as well as for transparency and traceability efforts to monitor their implementation.

This is particularly the case where informal sectors form large parts of the national economy and/or their place in supply chains is unclear, making it especially difficult to detect or address human rights abuses. Sub-Saharan Africa has the largest share (85 per cent) of the population engaged in informal labour³, with informal cross-border trade accounting for 30-40 per cent of trade in the region.⁴

It is also the global region with the highest prevalence of child labour.⁵ Within agriculture, a critical sector for the export ambitions of many African countries, supply chains and associated development opportunities may extend to thousands of dispersed and hard to reach smallholder farmers, in contrast to the more easily monitored and assessed large commercial farm model.

These factors create clear challenges for adhering to BHR measures, leading to reduced chances of securing critical access to global markets. Lost market opportunities can result in lower incomes, contributing to cycles of poverty, cultural norms and a lack of access to quality education which all increase vulnerability to human rights abuses and violations, including modern slavery and the worst forms of child labour.

Challenges are further exacerbated in fragile contexts where localities plagued by human rights issues are often within jurisdiction of fragile state actors, affected by corruption, and/or exhibit some forms of armed conflict, cartel control and population displacement. All of these factors make it incredibly difficult for well-intentioned businesses to safely implement due diligence practices and address any issues which are identified.



Purpose of the research

The impacts, complexities and unintended consequences of BHR measures are best understood from the perspective of those most affected by them. This research sought to identify how the implementation of BHR measures are experienced in EMDEs through a series of firsthand accounts — from the voices of those who are typically more invisible in supply chains.

For most participants, taking part in this research was the first time they had been asked about their experience of implementing BHR measures, as well as their perspective on what is working or not from efforts to-date.

The research aimed to gain an understanding of the positive impacts, challenges, and opportunities of regulatory and non-regulatory levers for reducing business and human rights abuses in supply chains in EMDEs, and particularly the unintended consequences of implementing these levers at the local level.

This report highlights the experiences of EMDE stakeholders up to now and their recommendations for development and implementation of emerging regulation which can help inform guidance, interventions and future policy development. It is not a qualitative assessment of the pros and cons of new regulations, and it takes no position on the effectiveness of regulations or other BHR requirements referred to by stakeholders.

Between 2018 and 2022, the Partnership Against Child Exploitation (PACE) undertook research which analysed commodity supply chains in-depth through a bottom-up mapping methodology. This found a number of unintended consequences on children and families from the implementation of conflict minerals regulations in DRC artisanal mining. Other studies around the same time identified similar challenges emerging within the implementation of business and human rights regulations and standards.⁶

A 2021 Organisation for Economic Co-Operation and Development (OECD) study on the Costs and Value of Due Diligence⁷ found that the majority of due diligence investment is spent on risk assessment, training, auditing and management systems – with very little applied at the furthest upstream reaches of the supply chain where children are working. The focus on risk assessment and traceability is driven by a combination of regulations, OECD Guidance, and questions that come to companies from investors or analysts i.e. “Please tell us how you assess the risk of child labour, and how you evidence it.” One of the key challenges investors and companies alike face as a result of these factors, is that significant time and cost goes into activities that have little material impact on reducing or mitigating the risks faced by workers and children, and therefore the risks to business. This often occurs not out of intent, but through a cycle of risk assessment, training and capacity building to incorporate increasing BHR measures.

Mandatory requirements, which place a greater emphasis of responsibility on businesses and their supply chains, have only very recently been (or are in the process of being) implemented. The wider impacts of these measures on EMDEs are not yet known or understood. Over the last couple of years, research to identify and understand

these impacts and unintended consequences – including challenges in adhering to the measures and knock-on impacts on poverty reduction and achieving the SDGs – has been increasing. This includes the recent FCDO funded report [Impact Transparency From The Ground Up](#), which found that doubts remain around market readiness for the adoption of sustainability disclosure norms in emerging economies (EMDEs), particularly by SMEs. It places a strong emphasis on the need to consult and design alongside commodity origin stakeholders. Other recent reports include the EU’s [Making mandatory human rights and environmental due diligence work for all](#), The Modern Slavery Policy and Evidence Centre’s [Effectiveness of mandatory human rights due diligence report](#), the EFA study on the [Spillover Effects of the EU Supply Chain Legislations](#), and the just released BIICL report [Towards New Human Rights and Environment Due Diligence Laws: Reflections on Changes in Corporate Practice](#). See Appendix A for a list of available reports at the time of publication.

In many contexts, there is evidence that BHR measures do lead to greater respect for human rights. In DRC, for example, BHR traceability measures have had the desired effect of reducing conflict at some mineral sites and have, to some extent, reduced the presence of children working on dangerous tasks. The research went beyond this, however, to obtain views on the balance between positive impacts, challenges and unintended consequences – for example in DRC where alongside some desired outcomes, unintended consequences for jobs and livelihoods were also clearly highlighted.

The experiences reported, and the recommendations made, by EMDE stakeholders are invaluable for development and implementation of new BHR measures, guidance, interventions and future policy development. They focus on how to mitigate unintended consequences and more quickly achieve the outcomes BHR measures are seeking.

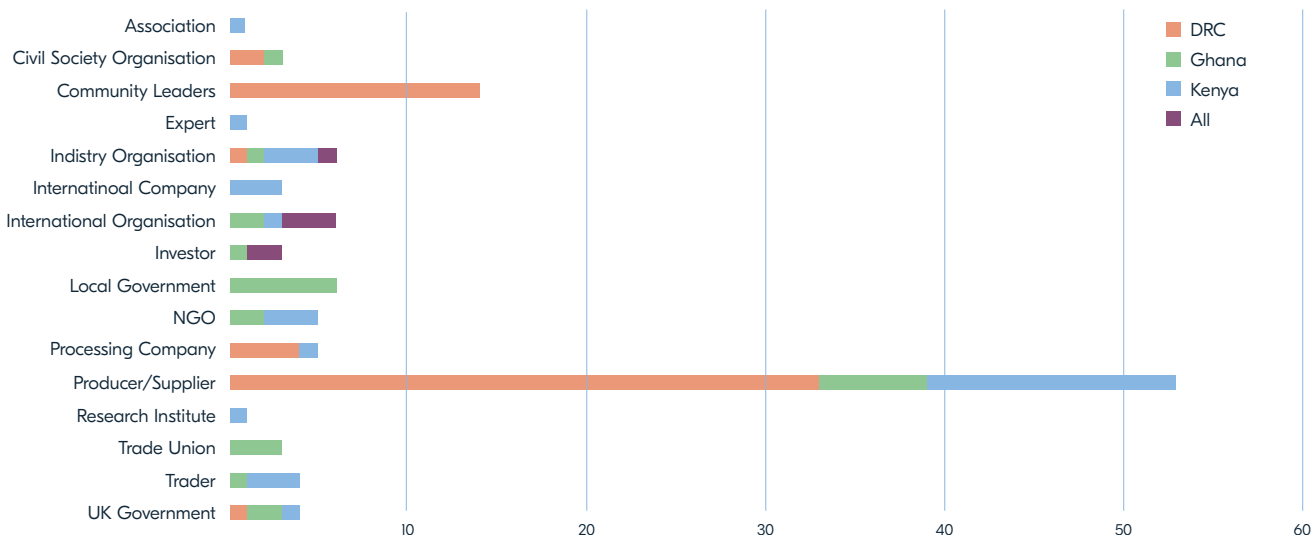


Methodology

The key questions the research sought to answer were:

- What are the **local impacts** of emerging global regulations in supply chain due diligence and responsible sourcing, including through trade policies, mandatory due diligence legislation, ESG regulations and any other requirements or frameworks? Are the new requirements seen as an advantage or opportunity?
- What are the **unintended consequences** of global regulations on progress towards SDG 8 and reducing human rights abuses (both from existing regulations and potential from emerging instruments)? Are there concerns that the difficulties of transparency and data collection might **impact ambitions** for accessing markets and attracting investors?
- What are the **local initiatives**, including those by government, business associations and CSOs in responding to the supply chain due diligence regulations? Particularly, what initiatives are already having or demonstrating potential for positive impact?
- What are the **challenges and opportunities of aligning local legislation, policy and business responses** with international standards and requirements in emerging global regulations — particularly for access to markets and attracting investment?

Number of Research Participants



The research involved consultations with 118 individuals in Kenya, Ghana and the Democratic Republic of the Congo (DRC). These individuals represent a broad range of stakeholders including producers and suppliers, processing companies, traders, industry organisations, investors, community organisations, civil society, local government and trade unions. Findings from DRC built on existing research from the four-year Partnership Against Child Exploitation (PACE) programme.

PACE findings incorporated insights from workers and their legitimate representatives, whereas the more recent consultations focused on the impacts of BHR measures on EMDE business owners and other value chain stakeholders rather than workers directly (whose perspectives are well captured in other more detailed studies in specific sectors and geographies).

Consultations varied by sector and stakeholder, and involved the development of research tools, context analysis, data collection from interviews, data analysis, and a validation workshop in each country to sense-check the findings. The research was undertaken with local research partners in each country – Partner Africa in Ghana and Kenya, and River Inc. in DRC. Key stakeholders from local businesses and multi-stakeholder organisations were also identified to create a ‘sounding board’ for continuous feedback on the impact of legislative frameworks on business and human rights.

This case study-based research used a snowball sample to provide an in-depth perspective of the perceptions and real-life issues of emerging business and human rights measures being implemented by western countries. It focused on actors who otherwise might be less visible in the supply chain (e.g. smallholder farmers) and findings are extracted from qualitative interviews with 118 of these actors. It examines their perspective on the experiences and complexities of situations that some value chain actors are facing in EMDE contexts, to enable a more comprehensive understanding of the positive impacts of BHR measures as well as challenges and unintended consequences.

The research covered all major existing and upcoming business and human rights voluntary standards (including the UN Guiding Principles on Business and Human Rights and OECD guidelines and guidance) and legislation, regardless of country of origin. Regulations included CSDDD, CSRD, FLR, EUDR, German Supply Chain Act, UK Modern Slavery Act, France’s Corporate Duty of Vigilance Law, Canada’s Supply Chains Act and the US Dodd-Frank Act. Broader regulation which can have both positive and negative impacts on BHR requirements such as the EU Deforestation Regulation or Dodd-Frank Act for Conflict Minerals, and certifications covering human rights and labour rights standards were also included in the scope.

A close-up photograph of a hand with a dark complexion pointing towards a large pile of coffee beans. The beans are spread out on a wooden tray, and the background shows more trays and some greenery, suggesting an outdoor or semi-outdoor coffee processing facility.

Case study countries

Stakeholders in each of the three focus countries had unique perspectives on BHR measures, arising from differences in context as well as their awareness and concerns regarding business and human rights requirements.

There are different levels of policy and regulation in each country. For example, Kenya was the first to develop a National Action Plan on Business and Human Rights. Ghana is moving in that direction. Democratic Republic of the Congo is also taking initial steps through the Alliance 8.7 Pathfinder Roadmap⁸. Pathfinder countries are committed to translating public commitments into concrete action by trying new approaches and collaborating with others to develop, adopt and put into practice improved legislation, national action plans or policies on child labour, forced labour, modern slavery and/or human trafficking. Ghana and Kenya have similarities in terms of a more diverse and complex private sector and markets, especially for value added exports. The DRC private sector (beyond extractives raw material export) has high ambitions to diversify and retain more value add to its existing and potential exports, but currently has perhaps less capacity and familiarity with data collection and reporting requirements for investors and markets.

National regulatory landscape mapping in the case study countries highlighted limited national regulation linked to broader business and human rights requirements i.e. all three countries have implemented or are developing legislation related to Human Trafficking, whereas regulation on labour or related protections is very limited.

These elements may have had a significant impact on what BHR measures the stakeholders in these sectors pay particular attention to, and the systems they have in place to ensure implementation.

Overall, each of the three countries have the opportunities and potential infrastructure in place to ensure business and human rights measures can be implemented at the local level, although challenges remain in ensuring access to markets and attracting investments.



Kenya

Kenya has strong existing export markets. This research focused on:



- **Tea** - farming, processing, export, industry governance



- **Coffee** - farming, farmer cooperatives, processing/roasting, export



- **Cut flowers** - farming and export

With a population of over 55 million, Kenyan law generally protects key human rights within the workplace, including forced and child labour, discrimination, occupational safety and health, minimum wage and working hours, and freedom of association.⁹ The Kenyan economy is the largest in East Africa and it has experienced continued growth in GDP which has been attributed to ongoing public infrastructure projects, strong public and private sector investment, and appropriate economic and fiscal policies. The horticulture sector is one of the top foreign exchange earners for the country and generates approximately US \$1 billion annually, making it the third-highest foreign exchange earner. The sector comprises vegetables, flowers, fruits and medicinal aromatic plants. With around 5,000 hectares dedicated to flower cultivation, the flower industry exports over 200,000 tonnes of produce annually, valued at \$900 million. It contributes 1.3 per cent to the country's GDP. The tea industry also makes an important contribution to the Kenyan economy, as tea contributes to around 23 per cent of the country's total foreign exchange earnings and 2 per cent of GDP. Coffee contributes 0.2 per cent to Kenya's GDP and is the fifth largest foreign exchange earner.

Under Kenyan law, most forms of forced labour and child labour are prohibited and criminalised. Compulsory labour for preserving natural resources is allowed for a limited number of days per year. Nevertheless, forced labour and more notably child labour still reportedly take place in the country. According to the 2023 Global Slavery Index, around 269,000 people were estimated to have experienced forced labour or forced marriage in the country in 2021 – making it one of the countries in Africa with the highest prevalence of modern slavery.¹⁰ Both coffee and tea are listed as products at high risk of being produced by child labour by the US Department of Labour.¹¹



Ghana

Ghana has a commodity focused export market, but is transitioning to more diverse exports. Value chains considered by the research included:



- **Cocoa** - farming, aggregation/logistics, government trading body), export



- **Forestry** - tree growing, eco-tourism, processing mills, Forestry Commission



- **Cashew** - smallholder farming, village tree enterprises, buying agents/dealers, transport, retail, export



- **Apparel manufacturing** - cotton farming, fibre and yarn producers, textile spinning and milling, apparel & soft furnishing manufacturers, retail & wholesale, industry bodies, export

Ghana has a population of nearly 33 million and has a strong record of upholding fundamental rights and freedoms. Nevertheless, issues such as corruption, particularly in land administration, discrimination, and child labour persist in the country.¹² Ghana has experienced sustained economic growth which has ensured its overall stability compared to other neighbouring countries in West Africa. Ghana's agricultural sector accounts for around 19 per cent of the country's GDP. Cocoa accounts for nearly 20 per cent of Ghana's global exports and it has an international reputation for high-quality cocoa beans. Cocoa accounts for 20-25 per cent of Ghana's total foreign exchange earnings, generating around \$2 billion annually. Cashew is the leading non-traditional crop for export revenue in the country. Ghana is among Africa's major producers of cashew nuts and currently produces around 850,000 metric tonnes of raw cashew nuts each year – about one per cent of the world's total production. Ghana's textile and garment industry contributes considerably to employment, state revenue, foreign exchange, and economic growth and development. The sector officially employs more than 6000 people and exports goods worth about \$30 million annually.¹³

Under Ghanaian law, all forms of forced labour are prohibited and criminalised. According to the Global Slavery Index, 91,000 people are estimated to have experienced forced labour or forced marriage in the country in 2021.¹⁴ Forced and child labour are reportedly taking place within several sectors, including agriculture. In particular, there are high risks of child labour in the cocoa and textiles sectors in Ghana. For example, the Ghana Living Standards Survey estimated that 23,856 child labourers are involved in the weaving of textiles within the country¹⁵ – and these numbers are not included in the official employment figures above.



Democratic Republic of Congo (DRC)

DRC's export sector is primarily extractive focused, but long-term it aims to retain value in-country from extractives and also to diversify into other sectors for production and export. Value chains examined included:



- **Cobalt** - ASM and industrial mining, miner cooperatives, concession-owners, processing, export



- **Copper** - ASM and industrial mining, miner cooperatives, concession-owners, processing, export



- **Tantalum** - ASM mining, miner cooperatives, concession-owners, small and intermediary traders, export, due diligence/traceability scheme actors, armed groups, mining police



- **Cocoa** - farming, logistics/transport, processing factories, legal and export



- **Coffee** - farming, roasting/processing, legal and export

DRC has a population of over 99 million, and over 60 per cent of the workforce are employed in the agriculture sector. While employing a relatively slim percentage of the population, mining is the primary driver of growth in the economy, bringing in foreign currency through formal and informal exports. For DRC overall, the mining sector is its main economic driver— extractive industries contribute 98 per cent to exports, 18 per cent to GDP, and 18 per cent to government revenues.

Deeply intertwined, systemic factors make engagement from foreign buyers and investors challenging. Local firms highlight widespread corruption and difficulties in doing business, along with a lack of investment in infrastructure, and prolonged armed conflicts, as ongoing challenges.¹⁶ Further complexity comes in aligning national laws with international standards and requirements. For example, according to the US Department of Labour, the Congolese government has ratified all key international conventions concerning child labour, however its laws related to compulsory education do not meet international standards because children over age 12 are not required to attend school. This increases the risk of child labour as there is a significant gap between the compulsory education age and the minimum age of work, which is 18.¹⁷ The Government of DRC has recently proposed a new Strategic National Development Plan which sets the goal of modernising and industrialising the country by 2035.

A nighttime photograph of a busy outdoor market. In the background, a tall, illuminated minaret with a golden dome stands against a dark sky. The market is filled with people, stalls, and various goods, creating a vibrant scene. The foreground shows more market activity, including people walking and stalls with goods.

Key findings:

What do companies, investors, government officials and civil society in EMDEs say about BHR measures?

The findings were broadly consistent across the three case study countries, with nuances or particular examples highlighted throughout the report.

This section highlights what stakeholders from across the case study Emerging Markets and Developing Economies (EMDE's) are saying about:

- Awareness of BHR measures and their requirements
- Positive impacts and key challenges in responding to BHR measures
- The unintended consequences of BHR measures

What is the level of awareness of BHR measures?

41% of participants reported not being aware of any BHR regulation, whereas 100% of participants mentioned at least one standard or certification.

Awareness of BHR certifications and standards is greater than for BHR regulations although overall awareness varies across regions and sectors.

Participants highlighted they were much more aware of BHR certifications and standards than regulation itself. Awareness of measures varies across regions and sectors, and almost all interviewees, regardless of type, size or sector mentioned at least one certification or valid instrument during the interviews. The following international frameworks, regulatory measures, certifications or standards were referenced:

- The EU Deforestation Regulation (EUDR)
- EU Corporate Sustainability Due Diligence Directive (EU CSDDD)
- UN Guiding Principles on Business and Human Rights (UNGPs)
- The UK Modern Slavery Act
- The German Supply Chain Act
- France's Corporate Duty of Vigilance Law
- The Canada Supply Chains Act
- The Dodd Frank Act
- Fairtrade
- Rainforest Alliance
- GLOBALG.A.P./GRASP
- SMETA/Sedex
- C.A.F.E. Practices
- The ETI Base Code

Awareness of regulatory measures appeared to be better in bigger companies, and this was particularly true for interviewees that are used to doing business in markets such as Europe and the US. All stakeholders could mention at least one BHR certification or standard, while the majority could not mention a regulation specifically. This is also true of the Sustainable Development Goals (SDGs) which are generally only known to companies who work directly with the largest multinational corporations (MNCs). In all countries, it was highlighted that information generally comes through media and industry interactions, while in Kenya and Ghana companies also received information directly from buyers or others in the supply chain.

Interviewees also pointed to awareness challenges related to gaps between local and international law. In Ghana, particularly in the cashew sector, which tends to be less formal, local companies generally follow local labour laws rather than international standards.

Across all of the case study countries and sectors, there is often no awareness of BHR regulations and other requirements until buyers start to implement them in their supply chain. This means it can take significant time and work for requirements to trickle down the supply chain, as awareness and understanding grows at each tier — as such, there can be a long time-lag for the challenges of implementation to surface, or for positive impacts to be realised. For example, as a Ghana forestry sector stakeholder highlighted, “developing support on monitoring, adhering with regulation, and building capacity for the supply chain to be able to respond has taken 11 years to help build understanding of EU regulations and implications on trade.”

ESG (Environmental, Social, Governance) requirements help increase awareness of BHR measures due to their link with access to finance.

Some stakeholders reported that their awareness of BHR measures had grown through investors increasingly incorporating ESG related questions in their due diligence processes for providing finance. These requirements were increasing from a range of markets, including government and donor funding, private financing, bond and SME funds. Initiatives such as the [Emerging Markets Investors Alliance](#) are seeking to enable institutional emerging market investors to support good governance, promote sustainable development, and improve investment performance in the governments and companies in which they invest. ESG requirements in financial due diligence were seen by a number of stakeholders as a key vehicle to continue to increase awareness and accelerate implementation of BHR measures.

What are the positive impacts of BHR measures?

100% of participants in Kenya and Ghana reported a positive impact from implementing BHR measures, whereas it was only 30% of participants in DRC.

On balance, while there were positive impacts, all stakeholders highlighted more challenges and unintended consequences emerging from the implementation of BHR measures. While some organisations were achieving greater access to markets or investors, improving

worker safety and wellbeing, or enhancing relationships with buyers and industry as a result of successfully implementing BHR requirements, all stakeholders highlighted significant challenges in complying with BHR measures. These challenges are highlighted later in the report, but this section focuses on the positive impacts that have been experienced by EMDE stakeholders from BHR measures and supporting initiatives to-date.



Increased access to new markets, buyers and investors results from the implementation of BHR measures that are no longer viewed as needed “just to comply”, but as critical to operations and market access.

In both Kenya and Ghana, the implementation of BHR measures stemming from legislation, international standards, and certification was overall found to have a positive impact. Almost all stakeholders across all sectors — horticulture, floriculture, tea, coffee in Kenya, and cocoa, cashew, apparel in Ghana — reported that compliance allowed local companies to improve workers’ livelihoods, whilst for some it also helped them gain a competitive advantage to access markets in Europe and the US. In DRC, market access was one of the only positive impacts mentioned, though a wider sample of stakeholders may have highlighted other benefits.



“[BHR measures] have helped us access the global market. The positive impact has been at all of the levels of production and export, which has helped us deliver a safe and accurate product to our buyer.”

SME OWNER, KENYA

Producers across all countries flagged that they comply with human rights standards because buyers require them to, but some are also motivated to comply because this allows them to access more markets and in turn generate more revenue — “And also it’s the right thing to do.” One interviewee in Kenya highlighted that workers being able to flag issues through grievance mechanisms allowed them to “address risks before they become crises.”

According to several stakeholders, implementation of BHR measures is now “not just to comply” but has become critical to producers’ operations.



Improved worker safety, well-being and productivity is a key benefit of implementing BHR measures. Increased productivity was reported through consistent working hours and enforcement of rest hours, fair wages, environmental standards, access to maternity leave and health and safety improvements.

A Kenyan producer highlighted that “standardisation allows companies to be consistent in how they handle employment, such as onboarding and OSH. In turn, this grows employees’ confidence in the business.” Stakeholders reported that business and human rights measures do have a positive impact in addressing business integrity, enhancing compliance and ensuring workers’ rights are respected.

According to one producer, “productivity was increased through the consolidation of working hours and enforcement of more rest hours. Workers’ rights, particularly fair wages and OSH standards, and environmental standards have also been improved.” Local producers reported working specifically on ensuring fair wages, OSH, gender-based discrimination or harassment, and access to maternity leave. However, one interviewee reported difficulties in ensuring living wages due to producers competing with China over access to European and US markets.



“Workers being able to flag issues through grievance mechanisms allows us to address risks before they become crises.”

PRODUCER, KENYA



“Regulation not linked to business and human rights, i.e. the EUDR, is perceived to have potential positive impacts on traceability in supply chains, with the potential to enhance business and human rights activities as a result.”

TRADE POLICY ADVISOR, DRC



Enhanced relationships and industry involvement

including more direct relationships between producers and buyers were a key outcome of implementing BHR measures. BHR measures can ensure social inclusion as farmers feel part of an industry that values their views and contributions.

In Kenya, several buyers are trying to build more direct relationships with suppliers across all sectors and step away from auctions which act as middlemen between buyers and suppliers. Instead, some buyers reported preferring to have direct contracts with local suppliers in order to ensure transparency. In turn, building more direct relationships was reported as helping local companies with the implementation of business and human rights requirements stemming from measures and certifications.

In the coffee and tea sectors, buyers do not generally have a direct relationship with producers at the local level – but acknowledge the need to build these in order to ensure compliance with business and human rights measures. Trading companies in the flower sector reported having a more vertical structure, leading to direct relationships with local producers. This is leading to an increase in direct sales, although auctions remain the norm for selling most of the flowers grown in Kenya.

Local companies reported that sectors with longer-standing relationships with European or other buyers requiring BHR compliance – who have invested in putting systems in place to report on these issues – are likely to continue exporting to these markets. Instead, companies which are just setting up systems to export internationally, or who have the possibility to sell to buyers who don't have the same requirements for BHR measures, will likely look to diversify their markets and focus on countries or regions with less stringent regulations.

Some participants noted how human rights provisions ensure social inclusion as farmers feel part of an industry that values their views and contributions, and have a better understanding of the industry and their responsibility within it.



Increased measurement of BHR impacts, particularly on behalf of international buyers. Some interviewees reported collecting data on labour standards, farming practices and rights of children – however there are significant challenges to achieving this at scale.

Collection of business and human rights data to measure BHR impacts, particularly from international buyers, is increasing. Some interviewees reported collecting data on labour standards, farming practices, and rights of children – and collating it in annual reports. However, there are significant challenges to achieving this at scale, as highlighted in the next section of the report.

Most stakeholders mentioned the EUDR when asked about BHR legislation. The UK is also in the process of introducing a regulation on Forest Risk Commodities, which may mirror the EUDR to some extent.



Increased knowledge and capacity from industry and government support, as well as support from buyers, donor funded programmes and other NGO activities. Programmes providing training on specific BHR issues, implementation support, and advice on how to obtain and share data have also been made available.

Some contexts are further ahead in addressing BHR issues than others. While this report cannot cover all of the existing initiatives, the insights below show current key initiatives as highlighted by the interviewees.

Existing initiatives and support

Some contexts are further ahead in addressing BHR issues than others. While this report cannot cover all of the existing initiatives, the insights below show current key initiatives as highlighted by the interviewees.



Industry organisations and government initiatives

Stakeholders highlighted that these initiatives play a crucial role in bridging the knowledge gap and providing capacity-building support. They offer training programs and guidance on navigating the complexities of BHR requirements, conducting human rights due diligence, and adapting operations to meet international standards. For example, in Kenya, organisations like the East African Growers Accelerator (EAGA) and the Kenya Tea Development Agency (KTDA) support local companies in obtaining Fairtrade certification.

There were examples of programmes which are implemented by third parties, such as NGOs, to help producers comply with standards and certifications. These often provide knowledge sharing by assisting companies in setting up internal frameworks to implement human rights due diligence, or through training and talks on specific human rights issues, such as gender, violence and harassment. For instance, the NGO Solidaridad is currently implementing the RECLAIM Sustainability programme to do this, funded by the Netherlands' Ministry of Foreign Affairs.

In the DRC minerals sector, support is typically provided via industry bodies or certification schemes – for example the RMI (Responsible Minerals Initiative), ITSCI (International Tin Supply Chain Initiative) or the Fair Cobalt Alliance. Participating stakeholders did not give examples in other sectors.

There were examples of local companies being given support to undertake human rights risk assessments by international and industry organisations, including the UN Global Compact. In the apparel sector in Ghana, there are some programmes in place to support local businesses on BHR initiatives, which focus on attracting investment and providing grants.



Buyer support

Some buyers and trading companies are proactively engaging with local suppliers to facilitate BHR compliance. They offer knowledge-sharing through training programs, particularly at the management level, covering topics such as BHR requirements and codes of conduct.

Buyers may provide further information on new legislation, such as through FAQ documents or wider knowledge-sharing – mostly via training at the management level, particularly in the cocoa sector (in Ghana) and the floriculture sector (in Kenya). In the apparel sector, some financial support is provided to local producers when undertaking audits which cover BHR issues, particularly when manufacturers are required to conduct several audits by a buyer.



Local initiatives and NGO support

A few initiatives and programmes are in place to support local stakeholders. Industry organisations and government initiatives work to support members on how to adapt their operating context to new and upcoming requirements, including on how to conduct human rights due diligence across their operations. They also provide capacity-building through training and giving support on how to obtain and share data.

The cost of complying with certifications and regulations typically falls on the smallholders and/or local producers in all contexts. These stakeholders are provided with support in terms of knowledge-sharing, particularly through training, e.g., from international buyers and other organisations and initiatives. However, almost no support is given to share costs across the supply chain. Local producers, across all sectors in Kenya, and in Ghana – particularly in the cocoa and apparel sectors – said that receiving premiums is key for ensuring they have the means to comply with BHR measures.



Donor-funded programs

SMEs and other stakeholders (who were not donors or implementers) highlighted that programs funded by foreign governments and international organisations play a vital role in supporting local businesses in various sectors – though challenges in ensuring they achieve their intended outcomes were also prevalent. These programs focus on attracting investments, providing grants, and building capacity for BHR compliance. For example, Ethical Apparel Africa, in collaboration with Accra Technical Training College and GIZ, has developed a degree program for middle managers in Ghana’s apparel industry.

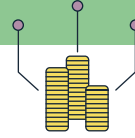
Other donor support initiatives exist, for example the UK-Ghana Partnerships for Jobs and Economic Transformation (JET) programme. While the programme has been successful in achieving its aim of helping Ghanaian companies export to the UK, the majority of programme participants have found the costs of implementing compliance measures to still be prohibitive.



“For us, the cost of £200k+ to implement necessary measures is too significant an investment on an initiative which may result in finding UK buyers, but is not guaranteed.”

SME OWNER, GHANA

A number of interviewees highlighted that relying solely on external support, such as donor funding, is not sustainable in the long term. They noted that initiatives should prioritise building the capacity of local actors – including government agencies, industry associations, and business service providers – to provide ongoing support for BHR implementation. However, they also noted that donor support remains crucial. SMEs in Africa can only compete with those in other economies if they receive valuable assistance in capacity building (knowledge transfer, systems building), machinery investment, and funding for recognised international audits while they increase their efficiency and work on international orders. Stakeholders highlighted that initiatives should ensure that support mechanisms are accessible to all businesses, regardless of their size, location, or level of formality. This includes addressing challenges faced by SMEs, businesses in rural areas, and those operating in informal economies.



Other initiatives

In Ghana there is an SME fund run by the British International Investment Institute. It provides direct lending designed specifically to help SMEs in the local context meet ESG requirements. It helps provide training and capacity building as EMDE companies are often not willing or able to absorb the costs of these activities themselves.

One local producer also reported putting in place a committee to address human rights impacts and providing capacity building and training for workers on how to address issues should these arise. Another interviewee noted they now have programmes in place specifically for farmers’ education on BHR issues.

What challenges in implementing BHR measures were reported?

100% of participants reported challenges in implementing BHR measures.¹⁸

Participants highlighted the following challenges which they have encountered when implementing BHR measures. Some of these may be a result of the design of the measure itself; the way implementation is interpreted at a country, industry, or company level; local contextual factors; or a combination of the above.



Expectations of BHR measures may not always align with local culture and local value chain realities, particularly in the context of a high degree of informality across different sectors or where children are involved in work from a young age.

In Ghana, for example, some hazardous work is prohibited for children, but this does not cover all activities in which child labour can occur, such as cocoa production.¹⁹ In Ghana's cocoa sector, BHR measures do not provide nuance to account for local contexts. Child work at the local level can be seen as a form of knowledge-sharing within a family business, but this work is often not formalised, meaning local companies struggle to show they are compliant with child labour standards from BHR measures.

Fixed working hours and fixed breaks, which were implemented as a way of adhering to compliance requirements, led manufacturers to lose Muslim workers who could not take breaks to pray throughout the day. This also applied to women, who may struggle with fixed hours as they need to account for, and have flexibility around, childcare.



“Fixed working hours with fixed breaks, which we had to implement to comply with the requirements, led us to lose Muslim workers who could not take breaks to pray throughout the day. For many of our female workers, they could not come to the site unless their children could come with them or be close by.”

MANUFACTURER, GHANA

In DRC, the mining sector is the predominant source of income for many communities. At most sites, children — who often cannot afford to go to school — are present in the mining sites in various roles, both out of necessity or by their own choice (through positive peer pressure, for example, seeing a friend working in the mine and earning money, and wanting to do the same). The sector is permeated with rent seeking behaviour and the artisanal miners at the bottom of the supply chain bear most of the costs, due to a cheese grater-like process by which formal and informal fees and cuts are taken at every level of the supply chain.²⁰ One of the largest sources of informal taxation, and a major barrier to the transportation of all kinds of goods in DRC, are militarised roadblocks operated by both government and non-government actors (mostly military groups but also some other actors such as cooperatives). A report by the International Peace Information Service (IPIS), focused on the political economy of roadblocks in North and South Kivu, identified nearly 800 such roadblocks operated by “entrepreneurs of imposition” who use their strategic position along key roads to make a profit from passing travellers.²¹

Informality across agricultural sectors in the case study countries can make it difficult to build farmers' understanding and compliance with standards. Together with broader contextual challenges such as fragile state actors, armed conflict, systemic corruption and poverty, these realities make it incredibly difficult for well-intentioned businesses to safely implement due diligence practices and address any issues which are identified.



“Why are people in Europe asking for this to be done? What is the context? Because it feels like you are wanting to destroy our industry.”

TRADE REPRESENTATIVE, GHANA



“If you look at all of these requirements and their evolution, and if they were implemented today in the way they were designed, the impact on our local economy would be huge and detrimental.”

INDUSTRY ORGANISATION, GHANA



Lack of preparedness and resources to comply or demonstrate compliance was highlighted as an issue. EMDE companies of all sizes reported this challenge, but it is acutely felt by smallholders in particular, who may be either willing to comply but lack the resources to do so, or are compliant but lack the time, resources or knowledge to show this. For local companies, a sense of BHR measures overload contributes to worry about the growing number of due diligence requirements.

A number of local companies either have BHR compliance mechanisms in place or are preparing to implement BHR certification. In the cocoa sector in Ghana, local companies are aware of BHR requirements and are working to get structures in place for compliance. In the apparel sector, companies focus on compliance with voluntary standards such as the UN Guiding Principles on Business and Human Rights and local law. Business and human rights are still not topical within the cashew sector and this is likely to be the case in similar informal sectors.

There are in-country local initiatives to support with readiness but operationalising support is difficult to do practically in informal economies (see section on *The positive impact of BHR measures* for details). Interviewees noted concerns about whether support is readily available, accessible, sustainable and affordable to all businesses – especially those who may not currently export or are not part of international supply chains. Some governments, i.e. Netherlands and UK, were reported to provide funding for projects aimed at social empowerment for local farmers.



“You are more likely to see due diligence in place if you are supplying to a big named organisation. Most companies are already contending with challenging national regulatory environments.”

TRADE SUPPORT INITIATIVE, KENYA

One interviewee noted that “this support is not enough for local producers and all stakeholders should share responsibility across the supply chain.”

The complexities of BHR compliance can disproportionately impact smaller companies and businesses operating in informal economies. They may lack the resources, knowledge, and capacity to implement due diligence processes, obtain certifications, and navigate complex regulatory landscapes. This can limit their access to global markets and hinder their growth potential.

In the agricultural sector, local companies reported that to prove compliance with several requirements, there is a need to get farmers registered as a certified group or to join a larger cooperative. However, they said that being registered does not ensure having a readily available buyer or market. For example, one interviewee highlighted that when companies have more available volumes of cocoa beans than what they can sell to buyers offering premiums, they will need to sell these to markets where no premium is paid (normally where BHR standards are not required).



“We have had some long-term partnerships [with buyers] and they provide training and support CSR activities, but 90 per cent of the cost is left to us, the producer, and the best way they can support us is if they increase the price of the stem.”

PRODUCER, KENYA



Local producers' willingness to comply with human rights standards is linked to the guarantee of long-term and high-volume contracts: farmers are reportedly hesitant to agree to undertake certification if there is no guarantee of returns.

Some stakeholders felt there would not be significant changes in what they need to do in practice as a result of upcoming EU BHR regulations i.e. CSRD, CSDDD, largely due to there not being an awareness yet of the regulations or what impact they may have on standards or certifications.

Stakeholders in Kenya and Ghana, particularly in the coffee and cocoa sectors, highlighted that BHR regulation in general, and deforestation regulations in particular could exclude smallholders from accessing international markets. Smallholders often lack the capacity and resources to comply with traceability requirements, such as geolocation of farms and documentation of land ownership. Additionally, regulations do not always account for the realities of informal economies, such as casual or seasonal work, making it difficult for businesses to demonstrate compliance. For instance, in Ghana's cocoa sector, the involvement of children in family-run plantations, considered a form of knowledge-sharing within the local context, poses challenges for complying with international child labour standards.

There is a significant gap for companies who have never done business in markets where BHR requirements are primarily developing, and for whom this access could result in opportunities to positively impact human rights outcomes. This includes existing or potential exporters who have products or exports that are not directly connected to major commodity value chains meaning they are also often not part of awareness or capacity building discussions.

While BHR regulations often assume that western companies will provide support to suppliers in EMDEs, this is not always the reality. Local companies may be left to navigate the complexity of requirements on their own, without the necessary resources or guidance.

The cost of compliance with BHR measures relative to priorities of production and getting products to market is a concern, particularly in the face of investor pressures to achieve high productivity whilst keeping costs as low as possible. Local companies feel a lack of support for covering the costs of implementation across all sectors, which is further exacerbated by power imbalances in supply chains.

Companies struggle with the time and cost of producing BHR compliance information relative to priorities of production and getting products to market. Resourcing these requirements can be a real challenge. Local companies feel a lack of support for covering the costs of implementation across all sectors. Ensuring compliance with human rights standards requires significant time and cost and companies feel BHR measures do not address the cost of implementation. For example, ensuring human rights due diligence often also means hiring new personnel, such as a human rights manager. This issue was particularly highlighted in Kenya, where smallholder interviewees highlighted that buyers require them to comply with human rights standards, including through policies and certifications, but offer little to no support to do this in practice.

Many local companies, particularly producers, are dependent on buyers for market access and often have limited bargaining power. Power imbalances are present between the top and the bottom of the supply chain and between buying and production countries. Local stakeholders reported that production countries "remain largely cut out of debates relating to new legislation, and these laws are 'pressed down' on us." This can create a situation where buyers dictate terms, leaving suppliers with little leverage to negotiate fair prices or receive support for compliance. In both Kenya and Ghana, local companies reported that compliance – particularly with certifications – is buyer-driven, but little support is offered in practice to implement requirements.



“Ensuring compliance with certification is expensive. We are prevented from increasing costs to cover this as we will lose customers, but at the same time are required to pay for audits and prove compliance with human rights standards.”

PRODUCER, KENYA



“We find putting these requirements in place time consuming and expensive.”

ASM COOPERATIVE LEADER, DRC

Producer companies have to adjust their prices to include the cost of implementation, however, unless premiums are paid this can have resultant effects on wages or place other pressures on the business. One interviewee noted that business and human rights requirements “should not be used as trade oppressive mechanisms on infant industries preventing them from accessing the international market.”

Absorbing these costs of compliance is particularly challenging for companies who also have their own investor pressures to produce results and keep costs as low as possible. However, there were examples of positive outcomes too, particularly in the Ghana cashew sector.



“For example, setting minimum prices has helped with the prevention of child labour. And there has been an improvement in working conditions, through the payment of a minimum price per kilo of cashew to the farmer.”

SMALLHOLDER FARMER, GHANA

Some stakeholders also said they felt that measures requiring the implementation of human rights standards did not have the intended impact, pointing out “compliance with standards does not translate into higher prices for our products.”

BHR measures and data requirements are created from a developed economy mindset, which leads to data requests and standards that are based on a “western perspective” of what data is available. Participants highlighted that the realities of data availability and consistency in many EMDE contexts is generally at direct odds with BHR measure requirements, resulting in a mismatch between the demands of BHR measures, the capacity to understand and report meaningfully, and the data ultimately provided.



“Regulations and standards at times feel very difficult to implement and comply with in practice – because when legislation is developed it is top down without much input from local stakeholders. Legislation needs to be much more practically implementable.”

PRODUCER, KENYA

A mismatch between data requirements and the realities of data availability and consistency in many EMDE contexts can create significant challenges for compliance. Regulations may require data that is not readily available or is difficult to collect and report in a meaningful way.

Stakeholders also highlighted that different measures or certifications require showing compliance in different ways, particularly concerning how human rights impacts are tracked and reported. One local producer in Ghana noted that this leads to a general feeling of “requirement overload.”

Supplier compliance is usually checked by international buyers through annual questionnaires, and suppliers are expected to discuss issues that may arise through grievance mechanisms. However, one interviewee stated that “this is an expectation and not a requirement”, meaning there is generally no comprehensive system in place to track compliance and address any identified BHR risks or impacts.



Traceability is also hindered by the fact that sectors like coffee depend on “middlemen”, between the smallholder farmers and the buyers exporting products to international markets. One interviewee noted that coffee will go through brokers and auctions before reaching the buyer, which creates issues of transparency and a disconnect with certification. Because of the presence of middlemen and auctions, the final export markets often vary – one interviewee noted that, although their main markets are within the EU and US, they are now looking to export to China or the Gulf instead where BHR requirements do not exist.

Furthermore, stakeholders in both Kenya and Ghana flagged that there is a high risk that emerging BHR regulations i.e. EUDR will cut off smallholders’ products from entering European markets. In particular, they noted that smallholders would not have the capacity to ensure the geolocation of their farms (as required by EUDR), especially in those sectors where middlemen are involved. Land ownership was also flagged as a key issue, particularly for the tea sector in Kenya. As farmers often do not own the land that they work on, traceability is difficult. Another interviewee noted that many estates are owned by UK companies and other foreign owners, perpetuating colonial legacies.

Local companies highlighted that they are increasingly required to comply with human rights standards through contractual clauses. In practice, this means undertaking self-assessment questionnaires and ensuring grievance mechanisms are in place. Buyers may also ask producers to share workers’ contracts and CCTV footage in order to ensure compliance. Local suppliers are required to undertake several audits and implement corrective action plans where issues of non-compliance are identified.

In some contexts, however, industry organisations have developed handbooks on certain measures and are disseminating them at the local level to help with simplifying data requirements. This is in addition to other pre-existing tools that were developed to support companies to monitor and remediate BHR impacts. These aim at supporting and not “punishing” farmers to address BHR impact areas such as child labour.

Misalignment between local laws, BHR measures, and highly regulated environments to ensure compliance adds complexity. This can result from the way local authorities interpret global requirements as needing a highly regulated environment to try to ensure BHR standards and compliance. The challenge of implementing BHR measures is further exacerbated in fragile contexts, including armed conflicts, cartel control, and population displacement.

Local laws and international standards do not always align. In Kenya, local companies flagged that they struggle to implement both national and international standards where these are not aligned. The most cited example of non-alignment was child labour. Kenyan laws on child work do not limit the hours of light work that children (ages 13-16) are permitted to undertake, except for agricultural and horticultural work. This is in contrast with what is required under international standards, i.e. ILO Minimum Age Convention (No. 138).²²

Companies in Kenya reported that their policies are often based on local law requirements. In Ghana, particularly in the cashew sector, local companies reported complying with their internal policies based on local laws only, as buyers did not require them to comply with certifications.

A number of companies described the challenging environment that results from the way local governments interpret global requirements – often creating a highly regulated environment to try to ensure standards and compliance. Capacity from law enforcement to enforce requirements is also often very low, making compliance extremely challenging.

Companies are worried about the growing number of measures and certifications that they need to comply with. This was mostly linked to the fact that local stakeholders are still unclear on what existing and upcoming international legislation will specifically require local companies to do. One example is living wages in Kenya. Stakeholders reported that businesses struggle with this concept as the gap between living wage and minimum

wage is not always clear. In particular, they reported that there is a gap between what is required under Kenyan law as compared to international standards, which makes harmonisation between national and international requirements difficult.



“We sometimes find a fatigue in government that we cannot keep up with these regulations.”

TRADE REPRESENTATIVE, GHANA



“In DRC there is a gap between what regulations say and what is implemented or enforced.”

ASM PRODUCER, DRC

What are the unintended consequences of BHR regulations or other measures?

97% of participants reported unintended consequences arising from BHR measures.

Further to the significant challenges highlighted in the previous section, stakeholders identified a number of unintended consequences that BHR requirements have had for businesses and communities in EMDEs. Unintended consequences means those impacts of BHR measures which are not intended or foreseen, and which run at odds to the intended outcomes the measures are seeking to achieve.



Jobs are at risk where EMDE companies are unable to resolve compliance issues, particularly in complex, sensitive areas such as traceability requirements for minerals that present high levels of risk to supply chains in conflict settings. EUDR requirements were highlighted as having potential to exclude EMDE smallholders from participating in EU markets.

Jobs (both direct and indirect) are put at risk when companies are unable to resolve human rights issues which are hard for any individual business to resolve alone. For example, if a shipment of minerals from DRC is stopped at the border because of suspected conflict minerals (a trade import ban requirement), then all companies who contributed to that shipment (both those with compliant practices and those without) will not be paid and will not be able to pay their workers. The banned shipment creates disruption in the value chain in both directions.

While there is clear indication that in many cases traceability efforts in DRC have contributed to reducing armed presence or conflict at some minerals sites and have, at least to some extent, reduced the presence of children working in dangerous tasks, DRC has seen a number of unintended consequences from the implementation of due diligence requirements related to conflict minerals, which are further exacerbated by the impact of corruption and ongoing conflict in the region:

- Incomes of all local miners have collapsed due to high fees for participation in due diligence and traceability schemes — which get passed upstream and sometimes exceed the total of all other taxes, further impacting the most prominent root cause of child labour — poverty.
- Negligible material impact of some due diligence schemes on improving livelihoods, or reducing child labour (in some cases implementation of due diligence is increasing it).
- Conflict minerals legislation i.e. Dodd-Frank Act has seen armed groups changing modus-operandi to become formal supply chain actors — thus maintaining control and income, whilst remaining invisible to monitoring.²³
- It is widely alleged that négociants will bypass exporters and smuggle minerals across the border to Rwanda and Uganda to get a better price. This is confirmed by export data which does not align with production activity in Rwanda.²⁴



Compliance over outcomes is a real risk where BHR measures are implemented to the 'letter of the law' rather than identifying the best way to achieve BHR outcomes in-line with the local context. The resulting disruption to local practices and cultural norms presents a further risk for loss of employment or job market access, and can at times increase negative BHR outcomes.



"We prioritise ensuring we are not at risk of being found non-compliant, rather than building systems that comply with certifications and at the same time support female workers in the local context. The risk of losing business is too high."

MANUFACTURER, GHANA

Stakeholders noted that because international buyers will only purchase from certified suppliers, this creates a further barrier to market access. Some producers will try to avoid reporting human rights issues in order to obtain certification as they might want to access a market "at all costs."

In some cases the implementation of BHR requirements disrupts local practices and cultural norms. A significant impact of this is linked to loss of jobs or lack of access to jobs where BHR measures are implemented to the 'letter of the law' rather than identifying the best way to achieve the BHR outcome in-line with the local context. Local stakeholders across all sectors flagged that this is a concern for new legislation: they fear that the more measures are introduced, the less they will be able to demonstrate compliance and will need to abandon traditional ways of handling business.

For example, in the apparel sector in Ghana, one local manufacturer noted that women workers have been asking for more flexible working hours and the possibility to bring their children to the factory floor to help address childcare issues. They often don't have access to alternative childcare and therefore have no choice but to leave employment. Interviewees pointed out that compliance does not allow for nuance around these childcare issues.

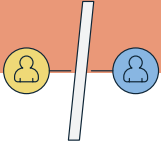
Other gender related issues were flagged as an area where there are gaps between international requirements and local practice. For example, one interviewee noted that sexual harassment remains a taboo in-country, which makes it difficult to identify these cases and address them.

In many contexts, participants said that there was a need to involve children in work to pass on learning and it is the way children are initiated into supply chains, the way they learn skills and develop.



"There's no connection between the price of the commodity and what is done towards improving human rights for workers."

GROWER, KENYA



EMDE companies acutely fear disengagement by developed economy buyers where they struggle to meet or demonstrate compliance with BHR measures. This arises where a lack of communication between local producers and international buyers results in different understandings of how compliance challenges are approached and responded to by buyers.

The proliferation of measures requiring companies to report on their human rights due diligence is creating an environment where local stakeholders increasingly fear disengagement should human rights issues be found in their operations. This is because of previous disengagement or stories from others' experience. It was also linked to a lack of understanding on the part of local producers on how disengagement is approached by international buyers, and a lack of communication from buyers about how BHR issues should be reported or addressed, as well as how buyers would respond.

Local producers reported that ensuring compliance with certification is expensive, and for smallholders in particular, they may either be willing to comply but lack the resources to comply with standards, or they are compliant but lack the knowledge and resources to show this. All suppliers said they struggle to understand how to show they are meeting human rights requirements and they are worried about the impacts this will have on their ability to maintain their relationships with buyers.

This is especially true where a sector is informal or small-scale. A key challenge businesses see when working with the informal sector is their lack of time and resources – as well as systemic challenges in the way the sector functions – to shift from informality to formality and enable BHR compliance. For example, 80 per cent of the private sector in Ghana is informal because of the way the market operates. Of the 20 per cent of companies

who are traceable either through tax receipts or regulatory requirements, many are smaller business holders who are struggling to access finance. Companies simply don't have the capacity, money or time to meet BHR requirements. Some local producers noted that they do not currently have a designated department or person in charge of checking compliance as this would be too expensive.



“Ensuring compliance with certification is expensive. We are prevented from increasing costs to cover this as we will lose customers, but at the same time are required to pay for audits and prove compliance with human rights standards.”

PRODUCER, KENYA



“Our sales have reduced due to buyer requirements”

ASM COOPERATIVE, DRC



“This usually means we have to choose which customers to focus on, as each customer will have different requirements we are required to comply with.”

GROWER, KENYA



Supply chain resilience can be affected where the cost of compliance and disruption to productivity from BHR measures leads to EMDE products becoming less competitive in global markets. EMDE companies may then shift towards other markets that do not have the same BHR requirements, again potentially affecting job security and economic opportunities.

The cost of compliance and disruption to productivity can make EMDE products less competitive in global markets, leading companies to shift their focus to markets that are not currently on the same BHR trajectory, such as China or the Gulf. BHR regulations can disrupt productivity and increase operating costs. This can lead to job losses and reduced economic opportunities.

Stakeholders in both Kenya and Ghana raised concerns about the financial burden of compliance with regulations, as they require significant investment in due diligence processes, certifications, and administrative efforts. The disruption to productivity and increased operating costs due to compliance with regulatory, trade, or certification requirements is pushing companies to sell products or in some cases move production to countries with less stringent requirements, such as those in the Middle East and China. This could undermine the overall goal of improving working conditions and human rights globally.

EMDE firms reported being excluded from western investor portfolios where those investors are seeking the highest standards in their investments — particularly where EMDE firms are struggling to meet social requirements.

BHR measures are increasing capacity for BHR compliance for companies exporting to western markets, but not for those exporting regionally or to markets without social compliance requirements. One participant shared the example of a factory that is looking to expand, and who is being encouraged to move to an industrial park — however for them to be compliant with BHR standards this would require others in the same shared facilities to become compliant as well. The other companies in the facility are not willing to share this cost as they export locally or to markets that don't have BHR requirements. The same issue can be a challenge for investors, who find that they cannot invest in the compliant company because there are others who share their facilities but do not have the standards in place they are looking for — therefore the risk of issues or reputational exposure is too high.



Donor dependency by EMDE markets and companies for continued compliance with ever-evolving BHR measures can lead to reduced decision-making power and autonomy, potentially stifling innovation and growth.

While stakeholders acknowledge the need for support from governments and international organisations to implement BHR requirements, there are concerns that this could create a new form of donor dependence. However, they also noted that donor support remains crucial. SMEs in Africa can only compete with those in other economies if they receive valuable assistance in capacity building (knowledge transfer, systems building), machinery investment, and funding for recognised international audits while they increase their capacity and work on developing international orders.

Recommendations

The voices of stakeholders at the furthest reaches of global supply chains, including workers, local communities, and small businesses, provide hard hitting recommendations. They focus on how to ensure positive outcomes and mitigate unintended consequences from BHR measures in EMDEs for stakeholders throughout the value chain – investors, buyers, governments and workers alike.

Mitigating these unintended consequences requires a holistic approach that involves collaboration between companies, investors, governments, workers and their legitimate representatives. To ensure positive outcomes from BHR requirements in EMDEs, a bottom-up approach is crucial. This involves actively engaging with and listening to the voices of stakeholders who are most affected by BHR measures and who are best positioned to identify challenges, propose solutions, and ensure that regulations are implemented effectively in their local contexts.

Taking a bottom-up view of the value chain helps identify and enable country and sector-specific strategies for BHR outcomes in ways that are realistic in terms of cost, practical implementation, and data availability in the local cultural context.

As BHR measures such as the EU CSDDD, CSRD or standards such as the OECD Guidelines and others increase, there is the potential that identifying and assessing risks will take the majority of attention and funding, meaning that interventions and activities which have the potential to positively impact outcomes for those who are experiencing hazardous or harmful working conditions will likely be delayed, pending insights from risk assessments.

One of the key challenges that investors and companies face is that significant time and cost goes into activities that have little material impact on reducing or mitigating the risks faced by workers and children in supply chains, and therefore the risks to business. This happens through a cycle of risk assessment, training, and capacity building to incorporate increasing BHR measures with new and nuanced requirements.

The outcomes BHR measures aim to achieve are urgent, particularly for those directly affected by negative BHR impacts and who are typically at the furthest reaches of global supply chains. However, they must be realised in the context of deeply connected and complicated challenges such as poverty, social inequality, cultural norms, fragile state actors, and lack of access to quality education – together with the very nature of global commodity value chains which are both formal and informal.



“Ideally, national laws or industry-level policies and frameworks would be created which are easily implementable and which commit all players to a level playing field – but which are grounded in local context and realities. If these requirements can be agreed at the national level, and local governments can agree laws which are aligned to EU or other global regulations this would make alignment and support of local businesses more effective.”

PRODUCER, KENYA

Incorporating these factors through a bottom-up perspective of the value chain should help deliver a balanced approach to achieving SDG 8: optimising effective market investment and regulatory levers towards improved business standards; sustainably building local capacity to meet export market business human rights requirements; raising job and livelihood standards for the most vulnerable through investment and increasing export market participation; and reducing the pressures to follow riskier routes and options. The recommendations are directly relevant to all countries who have committed to being Alliance 8.7 Pathfinder Countries and other similar initiatives.²⁵

There is a growing recognition of the unintended consequences that can occur from the implementation of BHR requirements, and there are some efforts and initiatives from countries, multilateral actors, businesses, and civil society to help address some of the impacts found in this report. Some contexts are further ahead in addressing the issues than others and while this report cannot cover all of the nuances and requirements, the insights and recommendations help paint a picture of some of the wider trends and aim to bring cohesion to the dialogue on how all stakeholders can most effectively and quickly work together to see its 'bottom-up' recommendations realised.

Sixteen recommendations are made in five groups:



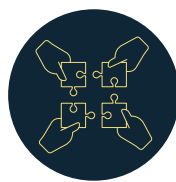
BHR regulations



Contracting and pricing



Traceability



Capacity sharing



Collaboration



Recommendations for regulations, policies, laws and standards

1

Conduct bottom-up impact assessments of BHR regulations to evaluate their feasibility and potential consequences at a national sector level

Developed Economy Governments and Donors

Throughout the research consultations, it was clear that there is both an urgent need and an opportunity to view BHR regulations and standards through a bottom-up approach that considers the outcomes that are trying to be achieved, and then identifies how to achieve these outcomes, taking into account the contextual needs of rights holders in EMDEs.

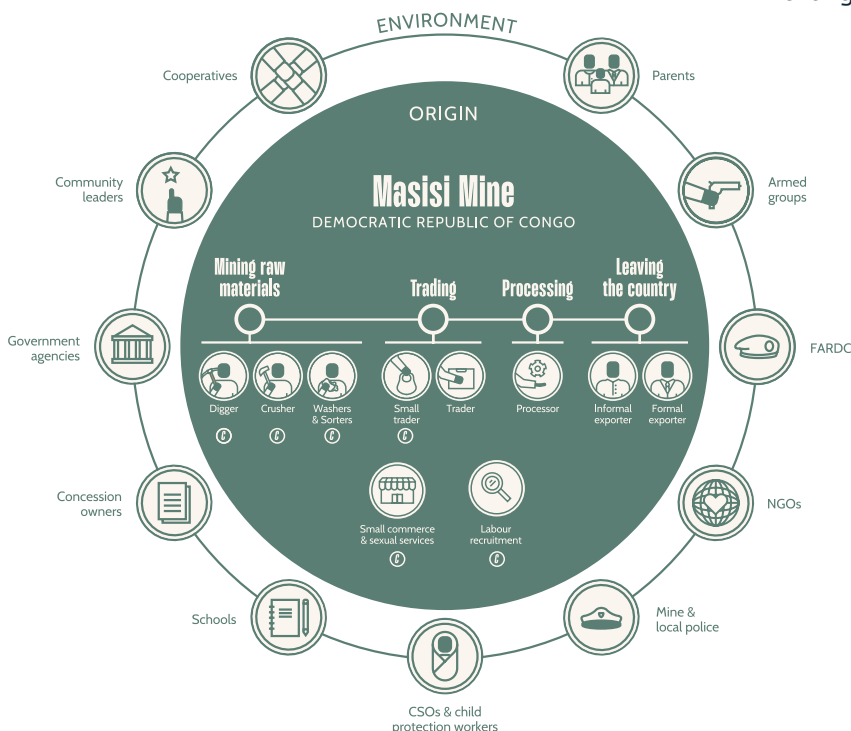
2

Involve stakeholders from EMDEs in the design and implementation of regulations and other BHR measures

Developed Economy Governments and Donors, Companies and Investors

Consultations on implementation guidance for regulations and certifications need to involve all rights holders in national-level impact assessment, legislation design, and national guidance – which incorporate the local cultural context and complexities of implementation.

These assessments should consider the capacity of industries to adapt and comply with requirements, taking into account both formal and informal aspects of local value chains. A practical and locally sustainable pathway to achieve the standards and provide supporting data should be in place before EMDE firms are asked to comply – taking into account the realities of how the local value chain currently functions formally and informally, and assessing the feasibility of changes that would be required to achieve compliance.



3

Strengthen and align local laws with global standards, including through the development of National Action Plans

EMDE Governments

Greater alignment of local laws with global standards can help businesses in EMDEs comply with regulations more easily. For instance, creating national laws or industry-level policies and frameworks aligned with EU, ILO, or other global frameworks would simplify the process for local businesses. These approaches could be accelerated through participation as an Alliance 8.7 Pathfinder country.

By adopting these measures, governments in EMDEs can play a critical role in fostering a business environment that respects human rights while promoting sustainable and inclusive economic development.

4

Incorporate local cultural contexts and value chain complexities into EMDE national legislation and guidance, with a particular focus on groups at heightened risk of vulnerability and marginalisation

EMDE Governments and Donors, Multilaterals

Local stakeholders in EMDEs expressed a desire for national laws and industry-level frameworks that are easily implementable, grounded in local contexts, and aligned with global regulations. Aligning local legislation with international standards can create a level playing field, facilitate compliance, and reduce confusion for businesses.

Governments and Donors, Companies and Investors

Local businesses mostly want support with capacity building and logistical support to understand the implications of regulatory and other requirements. They also want to know how to collect reliable data and report on it. Involving EMDE stakeholders throughout design and implementation would help identify the most appropriate frameworks and metrics for measuring change in the local context. More research needs to be done to monitor sectors and regions as new instruments are implemented.

This involves recognising the role of informal economies, traditional practices, and social norms, such as flexible working hours for women with childcare responsibilities or child work (compatible with international standards) as a form of knowledge transfer within families. A contextualised approach can help avoid unintended consequences that could harm local communities or businesses.



“Translate BHR requirements — whether regulatory or standards — into specific, practical steps which can be implemented in the local context. This could be done at an industry level in each country.”

TRADE INDUSTRY REPRESENTATIVE, GHANA



Recommendations for contracting and pricing

5

Prioritise EMDE company and buyer dialogue and engagement over disengagement on issues of compliance, contracting and pricing

Companies and Investors

Disengagement should be viewed as a last resort and instead, the focus should be on proactive engagement with suppliers to address human rights issues. This engagement should include financial and technical support, training, and capacity building to help suppliers meet BHR measures. Transparent communication about disengagement policies and a commitment to ethical disengagement practices are crucial for building trust and fostering long-term partnerships.

This also involves addressing concerns related to reputational damage, legal consequences, and loss of market access that may discourage businesses in emerging markets from investing and expanding.

Developed Economy Governments and Donors

Stakeholders want to ensure that both the potential for disengagement (as well as the negative impacts of this), and the potential for companies to be excluded from accessing markets, are considered at every step of policy or standards development and implementation.

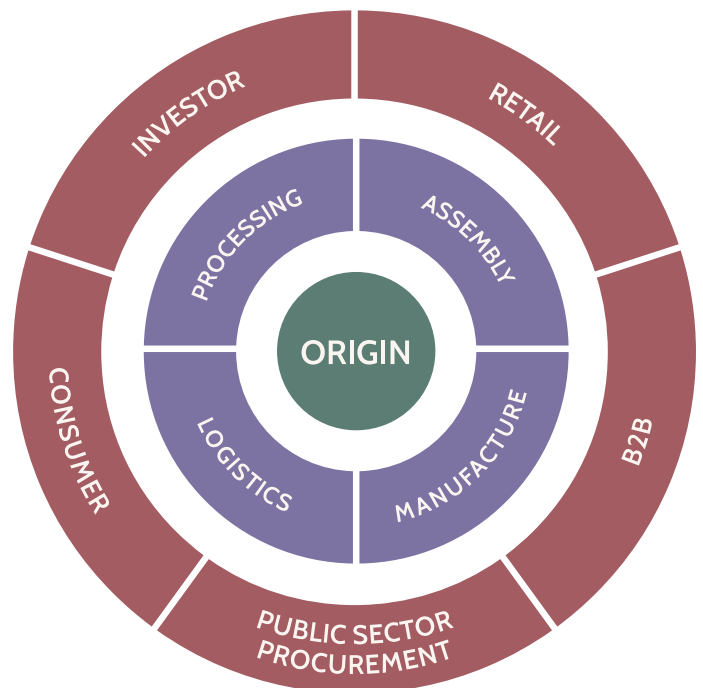
6

Address power imbalances in supply chains by explicitly recognising a principle of equal supplier-buyer partnerships in BHR arrangements

Companies and Investors

Buyers should adopt responsible purchasing practices, including fair pricing, shared responsibility for compliance costs, and transparent communication about disengagement policies. Supporting initiatives that strengthen the bargaining power of producers and promote more equitable relationships within supply chains is crucial.

This requires taking a bottom-up approach that places commodity-origin communities at the heart of industries they enable.



7

Support the development of direct relationships between buyers and suppliers in emerging markets to enhance transparency and reduce reliance on intermediaries

Companies and Investors

International buyers should build direct relationships with suppliers where possible. This could entail working with producers directly, or through investment aimed at capacity-building — for example, by helping suppliers build reliable systems to track, monitor, and report on relevant data. It could also involve facilitating direct contracts, promoting responsible sourcing practices, and reducing reliance on auctions or middlemen that obscure supply chain visibility.

International buyers need to be prepared to pay higher and more predictably stable prices for products through respected contracts to cover the costs of complying with BHR regulations. Premiums can incentivise producers to comply with BHR measures or be reinvested to improve the quality of life of local workers and communities.

Facilitating direct access to markets for small-scale farms and miners can reduce reliance on traders and increase transparency. This can empower producers and improve their bargaining power.





Recommendations for traceability, monitoring and evaluation

8

Assess supply chain risk in the context of collaborative sector, commodity or geography-focused initiatives to share learning and speed up progress towards outcomes

Companies and Investors

Re-evaluate and revise the risk assessment process for BHR risks. Instead of looking at each company and value chain individually, an approach that covers all affected sectors that utilise a commodity can help speed up change for everyone. For example, assuming that child labour is not just a risk but highly likely to exist would be a more effective place to start. Local stakeholders highlight the importance of undertaking risk assessments in the context of the local commodity first, then aggregating up from there as appropriate. This type of commodity risk assessment could be done in collaboration with industry organisations, communities and experts. This is particularly critical as most teams or individuals in companies who are responsible for BHR measures already have limited time and resources, so encouraging collaborative efforts above individual company responses can help address this challenge too.



“Taking a bottom-up view of the value chain helps identify and enable country and sector-specific strategies for BHR outcomes in ways which are realistic in terms of cost, practical implementation and data availability in the local cultural context.”

TRADE REPRESENTATIVE, GHANA

9

Develop innovative ways to ease the burden of proof for businesses adhering to BHR measures, linked to processes that enhance productivity

Companies and Investors, Multilaterals

Ensure measurement, monitoring, and traceability efforts are designed by local stakeholders and are achievable in their context. Local businesses want to know how to collect reliable data and report on it. Involving EMDE stakeholders throughout design and implementation would also help identify the most appropriate frameworks and metrics for measuring change in the local context. More research is needed to monitor sectors and regions as new instruments are implemented.

Companies and Investors, Investors, Governments and Donors

Consider options for a public traceability database for businesses to use; customs data – which can help identify goods that may be linked to forced labour – is currently available in the US, but not publicly available in the EU.²⁶ However, the EU will soon be launching a public database on forced labour risks with the identification of geographic areas of risk similar to the US Trafficking, Forced Labour and Child Labour databases which will go some way towards addressing this gap. Explore how to embed data from existing databases to ensure that information isn't siloed, but also consider how to ensure geographically based risk databases do not result in their own unintended consequences. For example, if this data is used by buyers or investors to exclude rather than work with or within geographies, they may miss opportunities to work with or invest in good practice businesses that already exist.

Governments and Donors, Companies and Investors

Local businesses mostly want support with capacity building and logistical support to understand the implications of regulatory and other requirements. They also want to know how to collect reliable data and report on it. Involving EMDE stakeholders throughout design and implementation would also help identify the most appropriate frameworks and metrics for measuring change in the local context. More research needs to be done to monitor sectors and regions as new instruments are implemented.

10

Reward EMDE companies for achieving positive outcomes, potentially through preferential market access, longer-term contracts, or pricing that reflects these outcomes

Governments and Donors, Companies and Investors, Multilaterals

Recognise and reward companies that meet or exceed BHR standards. This could involve preferential access to government contracts, public recognition, or other incentives that encourage businesses to prioritise human rights due diligence.

Offering premium payments for products that meet BHR standards can incentivise compliance. This can be a more sustainable approach than ad hoc monetary support for specific programs.

Rather than focusing solely on compliance, it is crucial to reward companies that go beyond minimum requirements and demonstrate a genuine commitment to upholding human rights. This could involve offering premium prices for products that meet BHR requirements, providing incentives for companies to invest in improving working conditions, and recognising businesses that are leading the way in responsible sourcing. Highlighting positive examples can inspire others to adopt similar practices and create a virtuous cycle of continuous improvement.

There is a particular need to recognise the efforts of companies and investors who are genuinely trying to create jobs and livelihoods for the most vulnerable in the highest-risk contexts. They will inevitably find more issues of forced and child labour, however as long as they address and remedy these following best practices, any market or reputational risk associated with them should be balanced with an understanding (by markets, regulators, or investors) of the inclusive economic development benefits they bring.

11

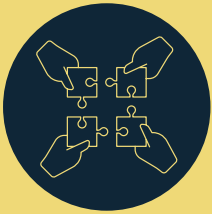
Engage with ESG data providers and benchmarks to balance ratings for better incorporation of BHR outcomes

Investors and Companies

Engage with ESG data providers and benchmarks to better incorporate BHR outcomes alongside environmental considerations. This could be linked to new developments such as the EU Critical Raw Materials Act, UK FCA ESG Code of Conduct or FRA stewardship code development and can help incentivise companies to prioritise BHR considerations.

Most of the data that is available to analysts regarding BHR is based on company policies, reports, or ambitions, or comes from controversies analysis (in other words, once an issue is already significant enough to be in the media). This data is therefore not complete and tends to be biased towards areas or companies with high levels of public attention i.e. is not very useful for comparing companies to each other or for identifying potential regulatory risk for the investment.

Where there is data, methodologies and universes differ significantly between providers, making datasets difficult to read across. Seek to address these potentially significant gaps in data for decision-making around material risks to resilience and stability of supply chains which could be disrupted due to delayed or cancelled shipments, litigation associated with increased regulation, or reputational risk from being associated with BHR issues.



Recommendations for capacity building and support

12

Promote initiatives that remove structural barriers to workers and communities in EMDEs participating in global markets

Companies and Investors, Governments and Donors

This includes providing training on BHR standards, supporting the development of cooperatives or other collective bargaining mechanisms, and facilitating access to finance and technology.

Workers and companies in EMDEs want to better understand the markets their goods contribute to, and whether they are receiving a fair price for their work. This can promote greater inclusion and economic empowerment.

Small-scale farms and miners wanted more direct access to markets, rather than having to operate via traders with little to no visibility of the following stages of the value chain.

Bridging the gap between formal and informal sectors is key. Strategies should be developed to help informal businesses transition to formality, enabling them to participate in global markets and benefit from BHR compliance.

Governments and Donors, Multilaterals

Addressing systemic issues like corruption and lack of infrastructure is essential. These challenges can hinder the effective implementation of BHR regulations and create barriers for businesses in EMDEs.

13

Support locally sustainable, disruptive innovations that enable positive BHR outcomes in global value chains

Companies and Investors, Multilaterals, Donors

Innovative partnerships and approaches can drive sustainable market solutions and faster development outcomes.

A complex web of interactions is needed to drive forward disruptive innovations that could enable positive BHR outcomes in global value chains – and innovative partnerships will be required to address them. These could include private market solutions, innovative public and private business support services, technologies that increase BHR effectiveness while reducing cost, business clustering, SME hubs, spillovers to local and domestic supply chains, etc. Greater inclusion in global markets can provide better opportunities for innovation and sustainability for EMDE companies to achieve the outcomes sought by investors and buyers who want to mitigate risk and ensure standards in their supply chains. Long-term initiatives could focus on increasing value-add processing in-country, for example building local smelting capacity to develop the minerals industry in DRC.

Governments and Donors, Companies and Investors

A key recommendation from local stakeholders is to invest in building the capacity of local business service providers to offer support for BHR compliance. This could include training existing business support organisations to assist companies with understanding and implementing BHR requirements, creating a sustainable and commercially viable model for the provision of ongoing support.

14

Provide direct financial and technical support to EMDE companies, particularly SMEs, but with a clear capacity trajectory and exit strategy to prevent long-term donor reliance

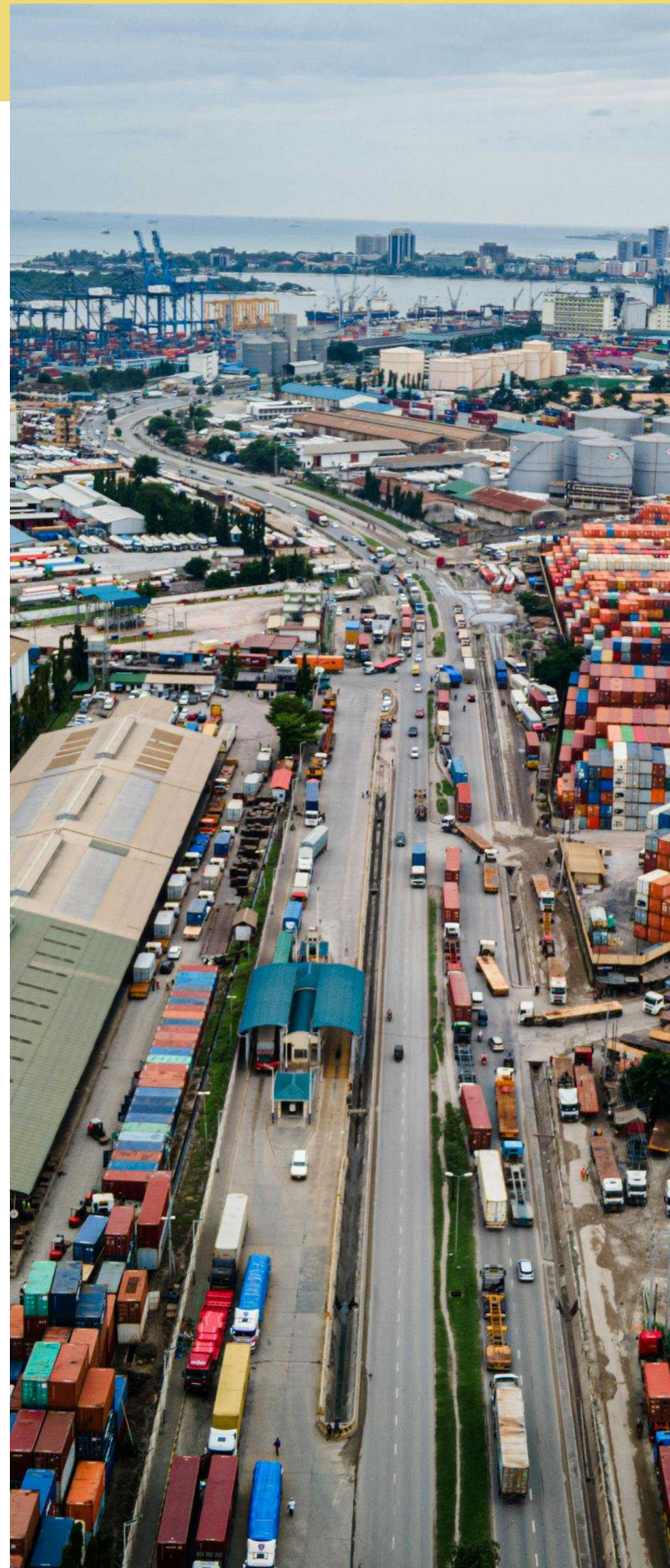
Governments and Donors, Companies and Investors, Multilaterals

This support could include subsidies, grants, tax breaks, access to low-interest loans, or guarantees of continued sourcing. Additionally, buyers should consider providing financial assistance directly to suppliers rather than solely relying on programs managed by third parties. Special focus should be given to those export-ambitious businesses that do not currently have export market contacts or relationships.

Consider the long-term sustainability of support mechanisms. While donor-funded programs can play a vital role in supporting BHR implementation, it is crucial to develop long-term, sustainable solutions that do not create dependency. This includes promoting market-based solutions, empowering local actors to provide ongoing support, and fostering an environment where businesses can thrive while upholding human rights.

Donor governments can use public procurement to promote BHR compliance. This can leverage the scale and influence of government purchasing power to drive positive change across diverse value chains.

It was also suggested that support or intervention models for BHR requirements could be built into trade partnerships to make the most of these mechanisms.





Recommendations for collaboration

15

Foster collaboration and dialogue that openly recognises the unintended consequences of BHR measures between stakeholders at all levels of the value chain

Governments and Donors, Governments and Donors, Civil Society, Multilaterals, Trade Unions

Encourage communication and collaboration between governments, businesses, civil society organisations, and workers to address challenges and share best practices in BHR implementation.

Conversations should be facilitated that emphasise the win-win aspects of pooling resources to address community challenges that impact BHR outcomes. For example, through convening key local actors in mining communities, such as local chiefs, cooperatives, transporters, exporters, and others. Emphasis should be placed on building up value chains adjacent to the mineral supply chain, such as transport, agriculture, and commerce, and investing in infrastructure which is important for these mining communities to thrive and be more productive. Win-win solutions should be the focus, with the goal of moving past the rent-seeking mindset common throughout the supply chain. Private sector investment in communities can be potentially matched by project financing, especially for key infrastructure such as schools and wells for clean water.

Facilitate multi-stakeholder dialogues. Creating platforms for dialogue among governments, companies, investors, civil society organisations, and workers is essential for sharing knowledge, addressing challenges, and fostering collaborative solutions. These dialogues can help to identify practical steps for BHR implementation, ensure that local contexts are considered, and promote a shared understanding of responsibilities across the supply chain. One of the biggest hurdles that needs to be overcome for companies to do this involves identifying or creating new legal ways for companies to collaborate and share information for genuine BHR purposes where antitrust and competition rules currently limit what is possible.

Collaborate with international partners and organisations to share knowledge, best practices, and resources for effective BHR implementation. This includes engaging with governments that have passed BHR legislation, multi-stakeholder initiatives, and international organisations like the UN Global Compact.

16

Encourage investments by both developed economy and EMDE investors that prioritise BHR and draw on consultation with investee companies, governments and workers

Governments and Donors, Multilaterals, Civil Society, Companies and Investors

Explore actions to benefit the local community that involve governments, civil society, and the corporate sector – with local communities playing a central role. Emphasis should be placed on initiatives that aim to understand and improve the local context and incorporate positive metrics for change. A collective theory of change to build systemic shifts in practice and resilience, along with faster data from origin communities, is needed to support and measure progress towards this.

Governments and Donors, Civil Society, Multilaterals

BHR regulations should not only focus on mitigating risks but also on empowering communities to participate in economic development and benefit from responsible business practices. This can involve supporting local initiatives, investing in infrastructure, and creating opportunities for community members to start their own businesses.

Investors

Work with other investors to collectively influence change. Engage with and support collective initiatives to reduce the need for duplication of activities, maximise the impact of engagement with investee companies, analysts, and ratings agencies – and speed up the impact of systemic interventions in origin communities. Identify and share best practice on ‘what works’ that can be replicated and built upon i.e. effective interventions, funding, corporate social investments in communities, etc.

Investors can leverage their influence to encourage companies to prioritise BHR in their operations and supply chains. Supporting companies that demonstrate a genuine commitment to human rights and sustainable practices can incentivise positive change and create a more responsible business environment.

Appendices

A. Research into the impacts of BHR requirements at the time of publication

Ancharaz, V. & IBF International Consulting. (2022). ASSESSMENT OF NEW EUROPEAN UNION REGULATIONS ON OACPS EXPORTS.

Anner, M. (2019). Squeezing workers' rights in global supply chains: purchasing practices in the Bangladesh garment export sector in comparative perspective. *Review of International Political Economy*, 27(2), 320–347. <https://doi.org/10.1080/09692290.2019.1625426>

European Union, European Commission, & International Trade Centre. (2022). International Partnerships Making Mandatory Human Rights and Environmental Due Diligence Work for All. In European Commission's Directorate-General for International Partnerships (pp. 2–61). https://international-partnerships.ec.europa.eu/system/files/2022-07/making-mandatory-human-rights-and-environmental-due-diligence-work-for-all_en.pdf

Fair Trade Advocacy Office, Hylander, M., Fairtrade International, Hyske-Fischer, M., Rainforest Alliance, Gauttier, F., Solidaridad, & Vieira, C. (2021). Supporting the implementation of the EU Corporate Sustainability Due Diligence Directive in global supply chains involving smallholders and their communities.

GSG Impact, UK government, Foreign, Commonwealth and Development Office (FCDO), IFRS Foundation's International Sustainability Standards Board (ISSB), United Nations Development Programme (UNDP), & International Foundation for Valuing Impacts (IFVI). (2024). Impact Transparency From The Ground Up.

International Trade Centre (ITC), Ghana Cocoa Board, European Union (EU), Organization of African, Caribbean and Pacific States (OACPS), ISEAL, & Suter, R. (n.d.). THE INTERNATIONAL TRADE CENTRE (ITC) AND GHANA COCOA BOARD INFORM ON EUROPEAN UNION (EU) CORPORATE SUSTAINABILITY DUE DILIGENCE DIRECTIVE [Press release]. APO AFRICA.

Johnstone, O., Hesketh, O., Bingham Centre for the Rule of Law, & British Institute of International and Comparative Law. (2022). Effectiveness of mandatory human rights and environmental due diligence. In *Modern Slavery PEC*, Modern Slavery PEC Policy Brief.

Joint ETIs (Ed.). (2024). Human rights due diligence in challenging contexts.

Khan, Z., Theobald, S., Ewinyu, A. K., Francis, D., Mogale, E., Valodia, I., Southern Centre for Inequality Studies, Krutham, & Taskforce on Inequality-related Financial Disclosures Interim Secretariat. (2024). *The Inequality—Financial Markets Nexus: Implications for Developing Metrics for Voluntary Disclosures* (Working Paper Number 61). <https://doi.org/10.54223/10539/37039>

Mares, R. (2024). The Unintended Consequences of Mandatory Due Diligence. *VerfBlog*. <https://doi.org/10.59704/1e76134f5aa24ba5>

Menke, J., & Shevchuk, S. (2021). Spillover Effects of the EU Supply Chain Legislations. In Greens/EFA Group & Anti-Slavery International, *Spillover Effects of the EU Supply Chain Legislations* [Report].

Ngangjoh-Hodu, Y., Gazzini, T., Kent, A., Siikavirta, K., Morris, P., & Ministry for Foreign Affairs of Finland. (2023). The proposed EU Corporate Sustainability Due Diligence Directive and its Impact on LDCs: A Legal Analysis (p. 102) [Book]. Ministry for Foreign Affairs of Finland. <https://julkaisut.valtioneuvosto.fi>

Pietropaoli, I., Elliott, J., Gonzalez De Aguinaga, S., & The British Institute of International and Comparative Law. (n.d.). Towards New Human Rights and Environment Due Diligence Laws: Reflections on Changes in Corporate Practice. In *The British Institute of International and Comparative Law*.

SOMO. (2016). Should I stay or should I go? Exploring the role of disengagement in human rights due diligence. In *SOMO Discussion Paper*.

Symbiotics. (n.d.). Misperception of Risk in Emerging Markets. In *Misperception of Risk in Emerging Markets*.

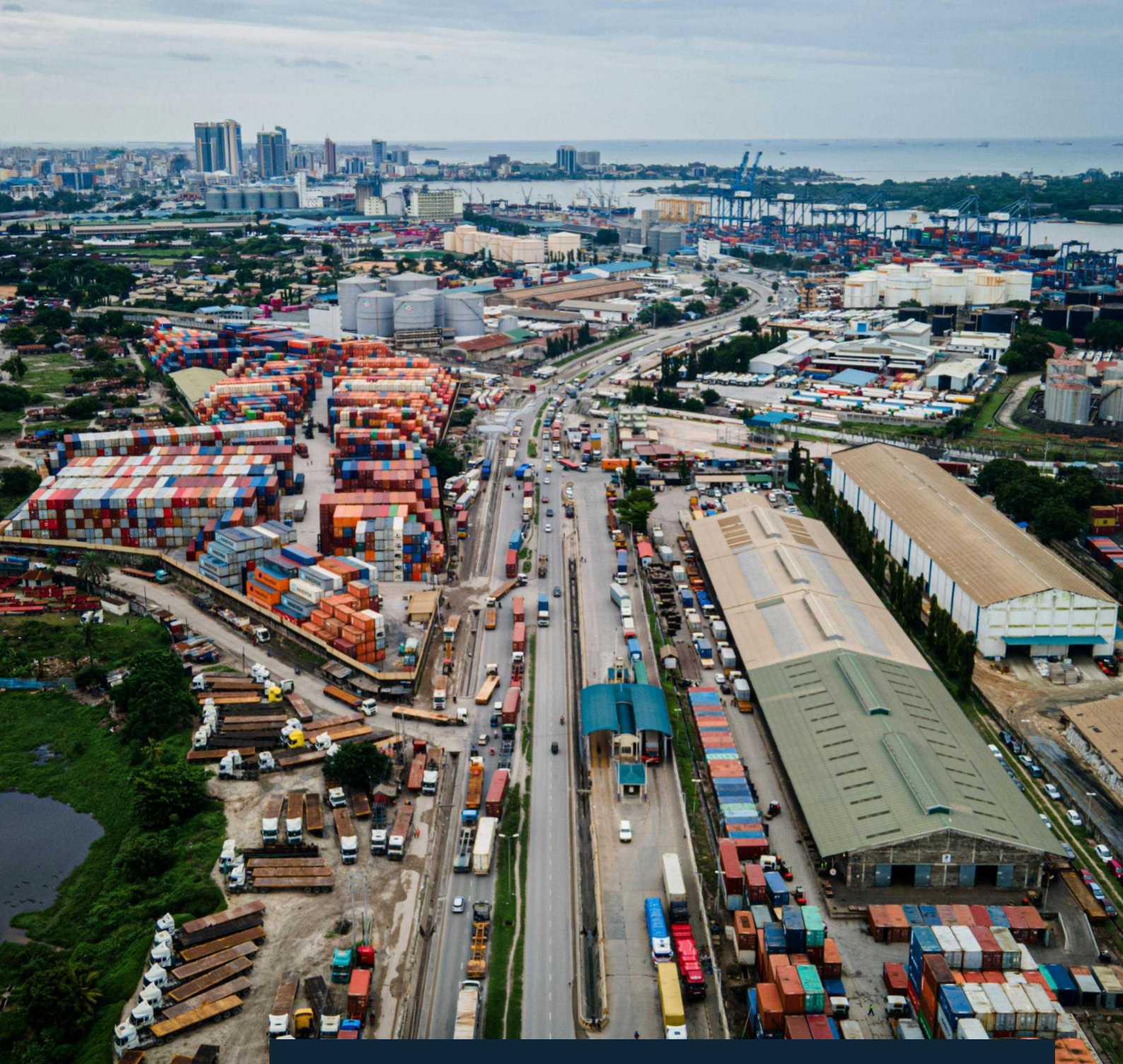
The Remedy Project, Freedom Fund, Sher, A., Novoa, D., Sreedharan, L., Nkuna, M., Wongsamuth, N., & Acharya, P. (2023). *The US Tariff Act of 1930*.

UN Human Rights (OHCHR). (2023). *Business and Human Rights in Challenging Contexts*. <https://www.ohchr.org/sites/default/files/documents/issues/business/bhr-in-challenging-contexts.pdf>

World Benchmarking Alliance. (2024). Are companies ready for the EU supply chain law? What WBA's social benchmark tells us about the state of corporate readiness to enact mandatory due diligence legislation. *World Benchmarking Alliance*. <https://www.worldbenchmarkingalliance.org/publication/social/>

Endnotes

1. [The transition from the informal to the formal economy in Africa, ILO 2020](#)
2. [Informal Cross-Border Trade and Trade Facilitation Reform in Sub-Saharan Africa, OECD Trade Policy Papers 2009](#)
3. [The transition from the informal to the formal economy in Africa, ILO 2020](#)
4. [Informal Cross-Border Trade and Trade Facilitation Reform in Sub-Saharan Africa, OECD Trade Policy Papers 2009](#)
5. [ILO Global Estimates on Child Labour \(2020\)](#)
6. See [PACE \(2020\) Democratic Republic of Congo: Mineral supply chain mapping and labour market assessment](#) and [IPIS \(2021\) Evaluating Due Diligence Programs for Conflict Minerals](#)
7. [Costs and Value of Due Diligence in Mineral Supply Chains - OECD Position Paper 2021](#)
8. [Alliance 8.7 Pathfinders](#)
9. [ILO, Labour Laws: Simplified Popular Version for the Micro, Small and Medium Enterprises in Kenya 2013](#)
10. [Walk Free Global Slavery Index 2023, Minderoo Foundation](#)
11. [List of Goods Produced through Child Labour or Forced Labour in 2022](#)
12. [Freedom in the World – Ghana Report](#) and [Ghana Risk Report](#)
13. [Oxford Academic Socio-Economic Review, Volume 22, Issue 1, January 2024](#)
14. [Walk Free Global Slavery Index 2023, Minderoo Foundation](#)
15. [List of Goods Produced through Child Labour or Forced Labour 2022](#)
16. [Democratic Republic of Congo: Mineral supply chain mapping and labour market assessment, Just Results 2020](#)
17. [Findings on the Worst Forms of Child Labor - Democratic Republic of the Congo | U.S. Department of Labor \(dol.gov\)](#)
18. Note: This is a measure against the sample size. As the research methodology was not primarily quantitative, there is no data to nuance.
19. [List of Goods Produced through Child Labour or Forced Labour in 2022](#)
20. [Democratic Republic of Congo: Mineral supply chain mapping and labour market assessment, Just Results 2020](#)
21. [“Everything that moves will be taxed”: the political economy of roadblocks in North and South Kivu”, IPIS 2017](#)
22. [List of Goods Produced through Child Labour or Forced Labour in 2022](#)
23. [Democratic Republic of Congo: Mineral supply chain mapping and labour market assessment, Just Results 2020](#)
24. [UN Group of Experts Final Report, June 2024, p.30.](#)
25. [Alliance 8.7 Pathfinders](#)
26. [ENNHRI Statement on the planned Forced Labour Product Ban in the EU, 2024](#)



Fifty Eight

About the research

This research was commissioned by the UK Government and delivered collaboratively by FiftyEight and our local research partners, Partner Africa in Kenya and Ghana, and River Inc in DRC.



Partner
Africa



RIVER INC.
CONNECTED SOLUTIONS

We are grateful for the expertise and dedication of everyone who has taken part in and given feedback on the research.

For any questions or follow up on the research, please contact research@fiftyeight.io. The executive summary and full report can be accessed at www.fiftyeight.io/research.

This material was funded by UK International Development funding from the UK Government, the views expressed do not necessarily reflect that of official UK Government policy.