



ETHIOPIAN ENTREPRENEUR SUPPORT ORGANISATIONS MAPPING AND INSIGHTS (2022/23) (Brief version)

Profiling and assessing the state of the ecosystem and reflecting on its growth conditions and opportunities.



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Report developed by:



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Consortium partners



Abbreviations

The following abbreviations are used in the report:

AACCSA :	Addis Ababa Chamber of Commerce & Sectoral Associations.
BIC :	Business Incubation Community/ies
EASE :	Ethiopian Association of the Startup Ecosystem
EU :	European Union
ESO :	Entrepreneur Support Organisation
GTP :	Growth and Transformation Plan
IP :	Intellectual property
MSME :	Micro, Small and Medium sized Enterprise
MfM :	Menschen für Menschen (People for People)
MinT :	Ministry of Innovation and Technology
MoLS :	Ministry of Labor and Skills
PE :	Private Equity
SME :	Small and Medium sized Enterprise
VC :	Venture Capital

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01: Summary

Entrepreneurship is growing across Ethiopia, as is the ecosystem of organisations supporting entrepreneurs in their journey towards societal impact and business success. Strengthening this growth and supporting the ecosystem with the right resources will be paramount to the speed and scale at which it can deliver on its potential of foster and unlock economic and societal progress.

This report provides an overview of the Ethiopian entrepreneurship ecosystem and highlights its challenges and opportunities. From 125 mapped support organisations and projects/programmes the report builds on contributions from more than 60 organisations that provided data, insights, and reflections on the ecosystem and its development. The mapping exercise solely focuses on entrepreneur support organisations (ESOs).

The Ethiopian entrepreneurship ecosystem has been growing rapidly over the past decade, with the government and private sector both playing important roles in promoting entrepreneurship and supporting startups. The government launched its Growth and Transformation Plan (GTP) in 2011, identifying entrepreneurship as a key driver of economic growth and development. It is now working on and implementing a range of policies and programs to promote and support entrepreneurship.

Despite these positive developments, the Ethiopian entrepreneurship ecosystem still faces challenges and barriers to growth. The lack of a well-developed startup culture and ecosystem can make it difficult for entrepreneurs to access the right resources and support they need to succeed.

A shortage of experienced startup support professionals, mentors and investors across Ethiopia make it challenging for entrepreneurs to find the guidance and resources they need to build and grow their business. Lacking funding limits the resourcing of ESOs while access to capital is a significant obstacle for startups looking to grow and scale.

The ecosystem challenges and priorities covers adequate resourcing and development of resources, ecosystem wide collaboration and engaging government support and policies.

With the right policies, programs, and support systems in place, Ethiopia has the potential to become a major hub for innovation and entrepreneurship in Africa and beyond.

Key areas to advance the ecosystem:

- ① Strengthen government relationships, collaboration and support
- ② Build and strengthen an organised and collaborative ecosystem
- ③ Increase funding to ESOs to build their capacity and resources
- ④ Develop a countrywide ecosystem for inclusive growth and support
- ⑤ Engage international funders and investors in the many opportunities
- ⑥ Increase pool of experienced and skilled entrepreneur facilitators and consultants
- ⑦ Implement ecosystem supportive and conducive policies
- ⑧ Promote a mind shift throughout society towards entrepreneurship

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02: Project background and introduction

The research and ESO ecosystem mapping are part of BIC Ethiopia, which seeks to strengthen Ethiopian entrepreneur support through several activities and efforts.

02.1: BIC Ethiopia

BIC Ethiopia targets strengthening the incubation ecosystem for entrepreneurs and micro, small and medium-sized enterprises (MSMEs) active in agri-tech and agri-business in Ethiopia. Key challenges addressed are sustainability of business models for incubators, quality of business support services, availability of services outside Addis Ababa, access to finance for MSMEs and strengthening the relevant regulative framework supporting start-ups. There is a specific focus to expand services beyond Addis Ababa to also cover secondary cities and rural Ethiopia to support geographically inclusive growth.



The project aims to address these bottlenecks in the Ethiopian startup ecosystem by working with fifteen (15) selected existing and newly established incubators and by supporting them in developing sustainable and technically sound business models. The incubators are thus enabled to better support start-ups and MSMEs in agricultural technology and agribusiness to improve market access, generate higher incomes and create jobs.

The action is implemented by a consortium of five organisations, led by sequa gGmbH, a German non-profit specialist in private sector development in low-income markets, active internationally since 1991 and in Ethiopia since 2002. The Addis Chamber of Commerce and Sectoral Associations capitalises on its reach-out to 50,000 SME members and its experience to shape national policies in favour of the private sector. adelphi gGmbH and GrowthAfrica Foundation contribute their vast experience in curriculum development towards start-ups, entrepreneurs, the capacity building of incubation hubs and acceleration programmes, and access to finance strategies. icehawassa, a national grassroots innovation centre, and the Ethiopia-focused foundation Menschen für Menschen (MfM) establish, expand, and manage incubation centres in the southern and northern regions.

BIC Ethiopia also works with the Ethiopian Association of Startup Ecosystem (EASE) and the regional network BIC Africa. The former is currently being established by private, academic, and non-profit incubators to serve as a network and discussion forum for incubation centres in Ethiopia, while the latter is a regional network supporting business incubators in Africa to excel and spark a wide impact in society.

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02.2: Report and mapping objectives

The mapping exercise and the research insights support the delivery of BIC Ethiopia with an emphasis on providing ecosystem stakeholders updated information and insights alongside a data set which it can build its network and collaboration.

It is a snapshot and a baseline for ecosystem stakeholders – not only but in particular for EASE to build on and make it a continuously evolving and relevant resource. This is a beginning and a conversation starter for collaboration and resourcing the ecosystem.

Objectives:

① Provide updated map of Ethiopian Entrepreneur Support Organisations (ESOs)

The mapping identifies ESOs and entrepreneur support projects and programmes across Ethiopia which have been active in the past 5 years. It provides a snapshot of the organisations supporting Ethiopian entrepreneurs. The map focuses on ESOs excl. the broader ecosystem of government, financial institutions, funders etc.

② Provide data and insights on Ethiopian ESOs and their growth needs

ESOs are profiled based on a set number of characteristics providing a picture of capabilities and needs for further growth. Typically this covers: Online presence, staffing, services and support provided, scale of activities, geographical reach, funding, growth needs, role of EASE, international relations, capacity building interests.

When defining the objectives and delimitations we have applied the following considerations:

- **Other organisations are mapping other aspects of the ecosystem**
Instead of covering broader but less deep, the aim ,was to go deeper with ESOs and then let other stakeholders map for example the financing side.
- **Need to openly communicate and share mapping efforts and activities**
Mapping exercises ought to build on each other, adding qualitative and quantitative value.
- **Need for coordination and collaboration to eliminate duplication**
Emerging ecosystems tend to reach a point where several / many entities will do mapping exercises duplicating efforts rather than adding insights and covering other/new areas of the ecosystem.

(Over)mapping leads to respondents' fatigue reducing the quantity and quality of the mapping, data and insights.

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03: Methodology

Reflecting the growing and evolving Ethiopian entrepreneurial ecosystem the mapping is delimited to cover and focus on Ethiopia's entrepreneur support organisations (ESO). Other key contributors to the ecosystem such as financial institutions, research and academia, government and policy are given the focus and scope of the mapping and the report is not included. Process and steps:

① Define target group(s)

It started by defining the type of organisations and support services that the exercise would focus on.

gender, diaspora / nationals / expatriates), years of operations etc. Seven key informant interviews were carried out.

② Desktop research and literary review

Literature review including identification and assessment of existing lists and repositories of ESOs. This step provided a shortlist of 45 organisations. As this is a relatively new topic Aspen Network for Development Entrepreneurs (ANDE) 2017 "Ethiopia – Entrepreneurial Ecosystem Snapshot," report is one of the few data sources.

Entrepreneur Support Organisations (ESOs) are in the context of this report defined as:

“Organisations, projects, networks and associations that support, train, or fund entrepreneurs.

Their mission is to help current or aspiring entrepreneurs move closer to starting or growing a viable business.”

③ Mapping exercise

Desktop research, own network and network contributions from ESOs and partners expanded the list of organisations to 205 which ultimately upon review resulted in a list of 124 ESOs matching the criteria.

⑥ Validation workshop

A representative group of 16 ESOs and industry stakeholders were convened for a two-hour workshop to provide their input and feedback on the mapping output and address areas that would need review. The forming Ethiopian Association of Startup Ecosystem (EASE) were furthermore involved in the validation.

④ Target group survey

An online survey was designed and shared with the identified organisations. This resulted in 80 responses of which 56 were assessed to be from relevant organisations matching the mapping framework and definitions.

⑤ Key informant interviews

Ten key informants were identified representing different types of ESOs and founder / leadership profiles (age,

The process has sought to leanly involve key stakeholders and include industry insights while having an inclusive representation of and from the ecosystem.

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04: Ecosystem profile

A brief introduction to the Ethiopian ecosystem providing historical context and background to the evolving entrepreneurial space.

04.1: History and background

Business and trading have always been part and parcel of a modern society and Ethiopia is no exception. The country has a history of trade and business starting from ancient gold, ivory and animals skin trade to today's online and digital business,

Fast forward the rise of entrepreneurship was halted following the 1974 revolution taking the country on a path of communism with nationalisation resulting in systemic demotivation of business development and entrepreneurship. The fall of the regime in 1991 was followed by a relative liberalisation of the economy but the culture of entrepreneurship was lost.

With the rapid population growth youth unemployment grew tremendously and entrepreneurship was logically viewed by government and development partners as a means to create sustainable jobs and economic growth.

The establishment of iceaddis, the first Ethiopian tech hub in 2011 created momentum and over the past decade new hubs, incubators and co-working spaces emerged. Entrepreneurship was included in university, TVET and high school curriculum.

Social entrepreneurship was added to the ecosystem with the British Council's programme support creating awareness and interest in entrepreneurship as driver of social impact.

UNDP and the Government of Ethiopia's Entrepreneurship Development Centre (EDC, now EDI) trained volumes of in entrepreneurship mindset and business development.

TV programs such as Chigign Tobiya and Lions Den have demonstrated that the media is starting to play its role in cultivating entrepreneurship in the country.

04.2: Today's ecosystem

The Ethiopian entrepreneurship ecosystem has grown rapidly over the past decade, with the government, development partners and private sector playing increasingly important roles in promoting entrepreneurship and supporting startups.

A key driver has been the government's commitment to promote economic growth and development through entrepreneurship. In 2011, the government launched its Growth and Transformation Plan (GTP), identifying entrepreneurship as a key driver of economic growth and development. This resulted in the implementation of a range of policies, programs and initiatives aimed at promoting entrepreneurship. It includes establishing a dedicated Ministry of Innovation and Technology and the launch of entrepreneurship support programs and funding initiatives such Bruh Entrepreneurship Competition.

The increase in funding and support for startups provided by a number of local and international investors, development partners and entrepreneur support organisations establishing a presence in Ethiopia have contributed to the sector's growth.

Despite the progress, the entrepreneurship ecosystem still faces a number of challenges and barriers to

growth. One of the most significant is the lack of a well-developed startup culture and ecosystem. It makes it difficult for entrepreneurs to access the resources and support they need to succeed. In particular, there is a shortage of experienced mentors, investors, and startup support professionals. This makes it challenging for entrepreneurs to find the guidance and resources they need to unlock their potential.

The ecosystem remains underfunded and the lack of access to capital is a major obstacle for startups looking to grow and scale. While there are a growing number of funding opportunities available for Ethiopian startups, many entrepreneurs continue to struggle to secure the financing they need to take their ventures to the next level. Key factors are a lack of investor awareness, shortage of qualified startup investment-ready opportunities, policies, and challenges related to currency and investment repatriation.

The ecosystem is in a state of rapid growth and development, with a range of promising startups and support organisations emerging. The government supported by development partners and the private sector need to continue investing in and supporting entrepreneurship and facilitate access to capital and resource entrepreneur support organisations.

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05: Ecosystem data and insights

We will share and explore some of the data and insights from the mapping exercise and highlight key aspects of Ethiopia’s evolving ecosystem of entrepreneur support organisations (ESOs).

05.1: Location and concentration of ESOs

Innovation hubs and incubators are the frontrunners and founders of what evolves into actual ecosystems. Starting from the capital city the maturity of an ecosystem can often be assessed by the extent to which it expands from the capital city to the largest secondary cities.

Across Ethiopia’s 13 regions the survey had respondents from 7 of the 13 regions. Given the situation in northern Ethiopia there were no respondents from Tigray or Afar hence the data does not reflect the no. ESOs in northern Ethiopia.



Table 1: Location by region of the respondents’ Ethiopian main office. Some are headquartered outside of Ethiopia.

Location by region	Population *	Area (km ²) *	Capital *	No. respondents	% of total
Addis Ababa (city)	3,384,569	527	Addis Ababa	41	73%
Afar Region	1,152,300	72,051	Semera	0	0%
Amhara Region	21,134,988	154,709	Bahir Dar	1	2%
Benishangul-Gumuz Region	1,127,001	50,699	Asosa	0	0%
Dire Dawa (city)	493,000	1,559	Dire Dawa	0	0%
Gambela Region	435,999	29,783	Gambela	0	0%
Harari Region	246,000	334	Harar	0	0%
Oromia Region	35,467,001	284,538	Addis Ababa	4	7%
Sidama Region	4,200,000	12,000	Hawassa	5	9%
Somali Region	11,748,998	279,252	Jijiga	2	4%
South West Ethiopia Peoples' Region	2,300,000	39,400	Bonga	1	2%
Southern Nations, Nationalities, and Peoples' Region (SNNPR)	9,126,000	54,400	Hawassa	2	4%
Tigray Region	7,070,260	50,079	Mek'ele	0	0%
Total				56	100%

(Note: Data in columns marked with * are from https://en.wikipedia.org/wiki/Regions_of_Ethiopia).

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05.2: Geographical focus

Whereas the international organisations operating in Ethiopia by default have an African or international outlook then only a handful of the Ethiopia headquartered organisations are looking at the continent and none are looking beyond. The focus is local, regional and national.

This is normal for an emerging ecosystem that is still building its capacity and business models – furthermore Ethiopia provides a very sizable market whereby until a high degree of specialisation has been reached there is little or no need to look beyond the national market.

05.3: Age and year of founding

Effectively the Ethiopian ecosystem starts and kicks off in 2011. A few organisations then join in the period of 2012-2017. The organisations founded before 2010 are universities, UN agencies, a number of international NGOs and internationally headquartered ESOs which only later have gotten involved with and supporting entrepreneurship in Ethiopia.

The real boost of organisations working with and supporting entrepreneurs comes in the period from 2018-2022 and 43% of the respondents were established in the past 5 years speaking to a young, emerging and quickly evolving ecosystem. Despite the challenging economic conditions created by COVID-19 the ecosystem saw 13 new organisations join the effort to support Ethiopian entrepreneurs in the past 3 years.

Presented on a timeline the emerging of new ecosystem organisations would look like this:



COVID-19 (2020-2021) and the internal conflict took pace out of the establishing of new entrepreneur support organisations. At the same time organisations are still establishing themselves while pivoting and settling on a business model and target audience.

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Table 2: Year the organisation was founded

Year	No.	% (of total)	% (from 2011)
Before 2010	12	21%	
2011	4	7%	9%
2012	3	5%	7%
2013	3	5%	7%
2014	1	2%	2%
2015	2	4%	5%
2016	2	4%	5%
2017	3	5%	7%
2018	8	14%	18%
2019	5	9%	11%
2020	6	11%	14%
2021	6	11%	14%
2022	1	2%	2%
Total	56	100%	100%

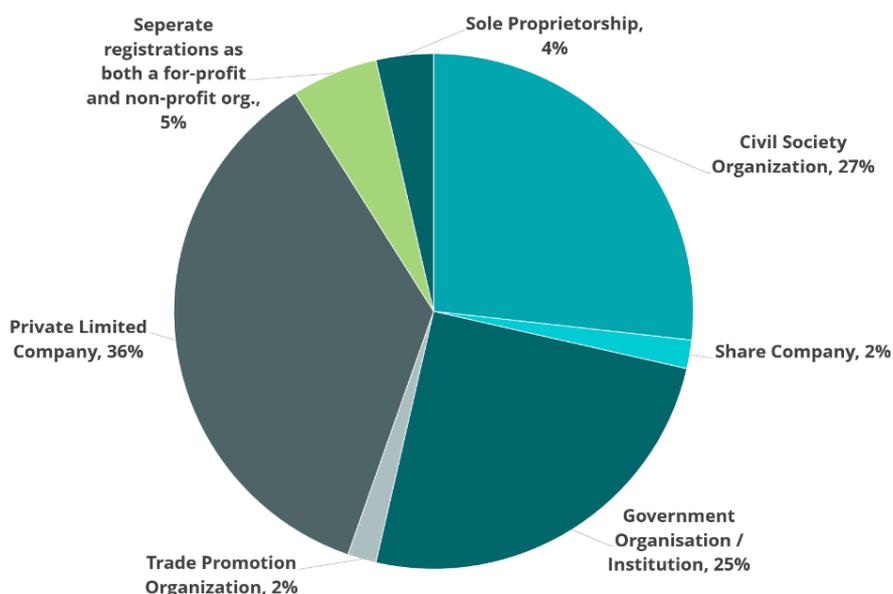
It should be noted that the data refers to the founding of the organisation and not when it started working with entrepreneurship. Some organisations such as universities have only just started to work with entrepreneurship and innovation in the past 2-4 years.

05.4: How are organisations registered

Entrepreneur supporting organisations outside the public sector have largely been set up as Private Limited Companies and relatively few as NGOs / CSOs.

Emphasis has been on getting the organisation set up and operationalised.

The process of setting up an organisation up as a NGO is like in most African countries harder and requires more resources (such as legal support) than setting up as a private company hence most organisations have pragmatically initially opted for this.

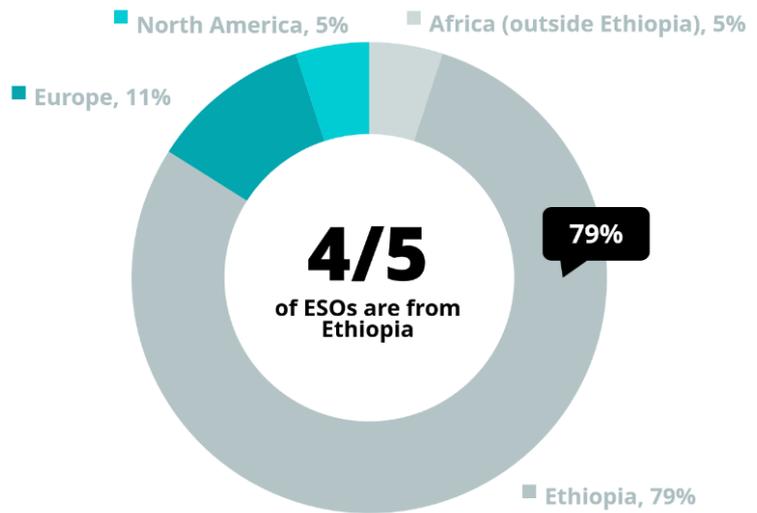


There is a growing realisation that a registration as a private company hence assuming for-profit activities excludes the organisation from responding and qualifying for a significant number of (international) tenders as well as applying for funding from philanthropic foundations as they typically require a not-for-profit registration and set-up.

05.5: Country of origin

The vast majority (79%) of the surveyed ecosystem players are founded in and by Ethiopians.

This speaks to a comparatively homegrown ecosystem at this point. International organisations are primarily from East Africa, Europe and North America - and Ethiopia is for all of them one of several African offices pointing at Ethiopia being part of a broader African expansion driven by strategy and / or funding opportunities.



Nairobi and lately Kigali have been the primary destinations for international players entry into Africa primarily seeking established markets, infrastructure, existing pipeline of entrepreneurs and/or strong government support as in the case of Rwanda.

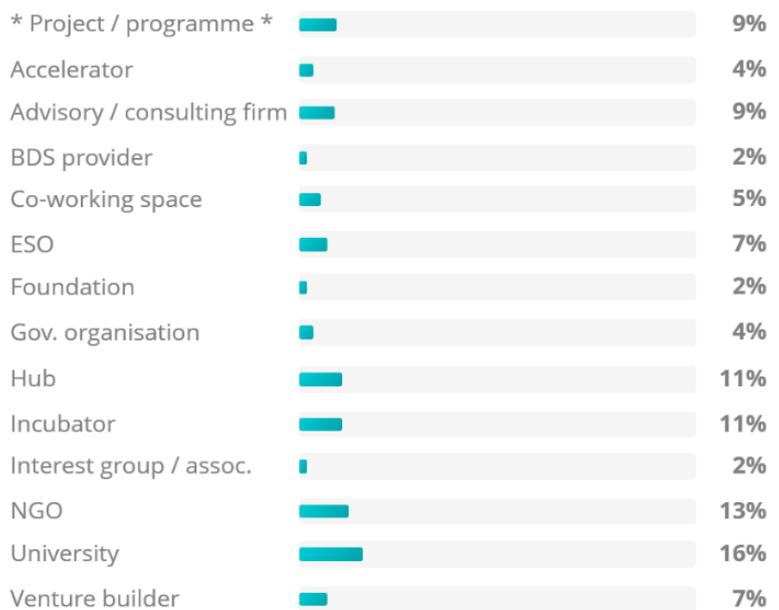
05.6: Types of organisations

Asked to select the primary category of organisation that ESOs self-identify as it is evident that the ecosystem is diverse in terms of the type of organisations it is comprised of.

Given that it is a young industry with only loosely set and evolving categorisation standards it is fair to assume that some of the types of organisations are the same/similar.

Some organisations such as universities are at this point solely playing in the incubation space.

If then reorganising the data a bit the



following overarching categories represent a snapshot of the primary ecosystem organisation type:

Table 3: Types of organisations (reorganised)

Type of organisation	No.	% (of total)
BDS / ESO / advisory firm	10	18%
Accelerator	2	4%
Incubator (incl. universities)	15	27%
Venture builder	4	7%
Coworking / hub	9	16%
Project / programme	5	9%
Gov. organisation	2	4%
Non-profit	9	16%
Total	56	100%

05.7: Type of support provided to entrepreneurs

When asked about their primary support services and activities that the ESOs provide to entrepreneurs then “Entrepreneurship training / education” and “Business strategy and planning” accounts for a combined 50% of the responses.

Table 4: Support you currently provide to entrepreneurs (primary - check the main one)

Support services and activities	No.	% (of total)
Entrepreneurship training / education	16	29%
Business strategy and planning	12	21%
Introduction to entrepreneurship	6	11%
Sector development	4	7%
Access to networks and partners	3	5%
Technology development or adoption	2	4%
Scaling and business expansion	2	4%
Investor matchmaking	2	4%
Digital skills and capacity	2	4%
Building HR capacity	2	4%
No support provided currently	1	2%
Media exposure	1	2%
Innovation methodologies	1	2%
Ideation	1	2%
Financial management	1	2%
Total	56	100%

Project lead

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Industry insights and reflections

by

Addis Alemayehou
Chairman of Kazana Group

Website: www.kazanagroup.com



“The last 5 years has been transformational. For the first time, we have a government that's more private sector focused and understands that private sector must be the leading force in the economy and creating jobs.”

There has been transformational change in policy in terms of understanding that with a population of 120 million people, 18 years being the average age that jobs and the economy and private sector growth is critical for survival.

What needs to be done is have the private sector need be invited to sit down and discuss before policies and regulations have changed.

Today, the doors are more open with access to the government made possible. Some issues have been addressed e.g., the wording regarding the government's communications around the Startup Act, and some of the inclusion of key sectors, e.g., IT that were previously neglected. They are now part of government strategy.

A key challenge is having the changed laws trickle down to the regular civil servants to have them understood and implemented. E.g., Ministry of Trade has stated that you don't need an office lease to start a business, but the Ministry of Revenue, insist on having an office lease to keep track of taxpayers, 10 numbers of machines etc. So that's been a battle to get that scrapped. It is also one of the biggest challenges for startups because nobody wants to pay 3 months or 6 months, rent upfront before they even start a business.

Addis shares “What excites me about this space is the potential of what's about to happen: There's a huge revolution that's about to happen. We just opened the telecom space and we're about to open the banking space. There's a huge youth bulge - we have 44 public universities that are churning out 2/3 million students a year. There is nowhere else with such an opportunity now.”

About Kazana Group:

Kazana Group promotes economic prosperity by supporting companies in Africa make impactful changes and solve critical problems. It empowers African entrepreneurs towards inclusive growth and development.

Category
Investor, BDS provider

Headquarters
Addis Ababa

Founded
2011

Ecosystem challenges;

- A lack of coordination between the people on the ground within the startup space. Ethiopian Youth Association is trying to change this. If supported, they can
- Few individuals and entities rather than coordinated efforts of the startup ecosystem pushing for certain reforms
- Lack of funding, because a lot of the businesses are just fairly new meaning, they are unable to push for reforms and do the work required

Three wishes for Kazana Group

- Resource support
- Access to entrepreneurs who have an idea, by the time they get to us. The current education system needs an overhaul. We're training kids to look for jobs, rather than start jobs
- System where we can all communicate, and this will open many doors e.g., VC funding

Ecosystem wishes:

- More organised ecosystem
- A more nationalistic view from the government in terms of the ecosystem and entrepreneurship and startup. The more we have young people going out and starting successful businesses and amplifying these successes, we'll have a lot more encouraged ecosystem, and have parents that will push the kids to start businesses.
- To support entrepreneurs outside Addis. There is some support going on but coordination across regions is still needed. To truly support the ecosystem, we need buy in from everybody and the ecosystem to have a national focus, not only focused on Addis

Challenges to address:

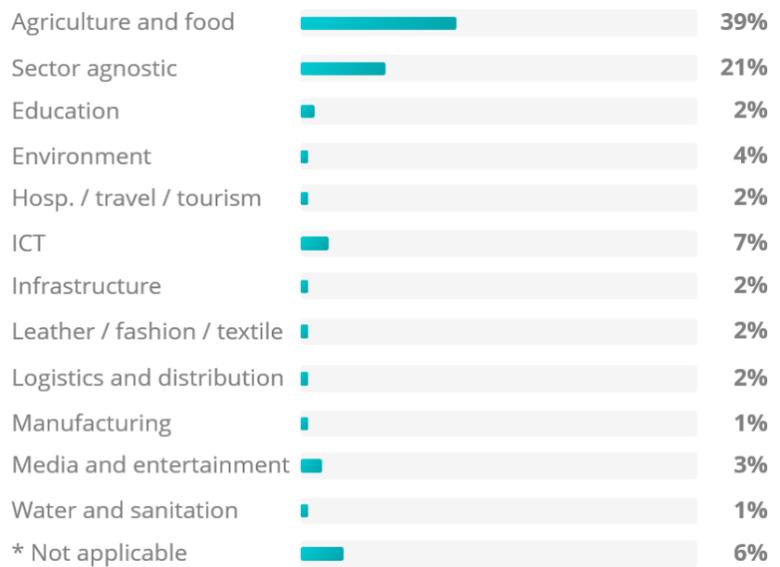
- Find a way to filter and find the young people with the great ideas
- Lack of resources
- Fill policy gaps that exist. The Startup Act needs to be activated as soon as possible
- Mind shift within the society

05.8: Industry and sector focus

The 79% of the ESOs which share that they have an industry or sector focus are focusing on industries and sectors which are aligned to and reflecting the Ethiopian economy, government priorities and donor support.

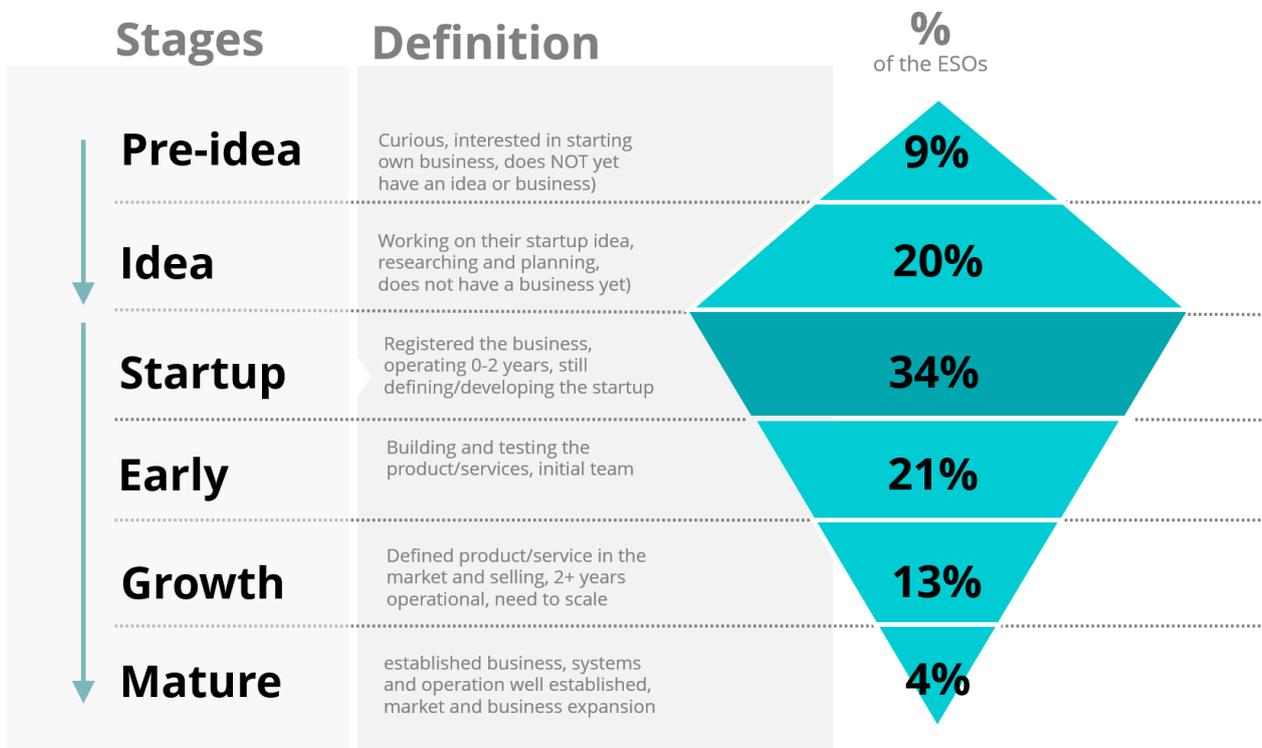
Agriculture/agribusiness and food processing are the clear key sectors followed by organisations with an industry agnostic approach.

Whereas ICT in the earliest days of the ecosystem - similar to most other ecosystems in Africa – was the key sector then it is today in a distant 3rd place. It should though be noted that the data represents the primary industry (if any) that the surveyed organisations focus on.



The emphasis on agribusiness is furthermore supported by the number of incubation centres emerging from the universities across the country.

05.9: Stage and maturity of entrepreneurs served



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Looking at the entrepreneurial ecosystem as a funnel supporting potential and aspiring entrepreneurs from the earliest point of their journey to the latest stage of their growth trajectory then the current ecosystem is diamond shaped whereby the number of organisations supporting pre-idea and idea stage entrepreneurs are less than the number of organisations supporting startups working on setting up and getting to market.

Whereas this speaks to the number of organisations and not the volume of entrepreneurs they reach and support it is fair to assume that the effort at those two earliest stages are reflective of the number of organisations focusing on the two stages.

As the ecosystem evolves there will be a need to stimulate and incentivise new or existing ESOs to focus on the idea- and startup stages to provide a stronger (quantitative and qualitative) pipeline for the subsequent stages.

The earliest stages are typically short and low-touch training focused activities aimed at relatively high-volume number of participants. As the businesses grows and matures the size of the activity cohorts will decrease and activities will shift to high(er) touch and more individualised support.

Getting the earlier / earliest stage activities to scale and volume will require a strong effort especially at university, TVET and institutions of higher learning to ultimately build a longterm pipeline for the ecosystem. It should be expected that a lot of the pipeline from the earlier stages will not pursue entrepreneur – or not immediately hence serves a long(er) term potential pool of entrepreneurs.

05.10: Who in the organisation are activities for?

With limited resources ESOs are made to choose whom to focus their support on – whether it is the founder(s), management team members / functional head or the larger team. The earliest stages this does make a big difference as teams are yet to form.

Of the surveyed ESO 46% are focused on the founder(s) and another 29% supports both the founder(s) and the management team. The remaining 25% provides support to a broader group within the organisation.

05.11: Financing: Annual turn-over

The surveyed 56 organisations represent an estimated total annual turn-over of ETB 250+ mill. (USD 4.6 mill.). This would put the guestimated total annual turn-over for the sector at about ETB 750 – 1,000 mill. (USD 15-18 mill.).

Organisations are running on very lean budgets, which explains some of the resourcing priorities and ability to invest in for example facilities, hiring more experienced team members or building internal resources.

Table 5: Annual turn-over

Annual turn-over (last financial year)	No. organisations	% (of total)
More than ETB 12,500,000 / USD 250,000	8	14%
ETB 5,000,001 - 12,500,000 / USD 90,000 -250,000	6	11%
ETB 1,250,000 - 5,000,000 / USD 25,000 - 90,000	14	25%
ETB 500,001 - 1,250,000 / USD 9,000 – 25,000	10	18%
ETB 0 - 500,000 / USD 0 – 9,000	18	32%
Total	56	100%

05.12: Primary source of income

Funding from donors whether directly via grants or indirectly via tendered projects or programmes accounts for 57% (39%+12%+6%) of the current revenue and with government support of 12% (primarily going into universities).

Table 6: Primary source of income

Source(s) of financing	No. organisations	% (of total)
Funding from donors	19	39%
Government funding / support	6	12%
Delivery of tendered projects / programmes	6	12%
Consulting services	5	10%
Sponsorships	3	6%
Education / training fees	2	4%
Funding from foundations	3	6%
Rental revenue	1	2%
Project / programme participation fees	1	2%
Other	3	6%
Total	56	100%

Project lead

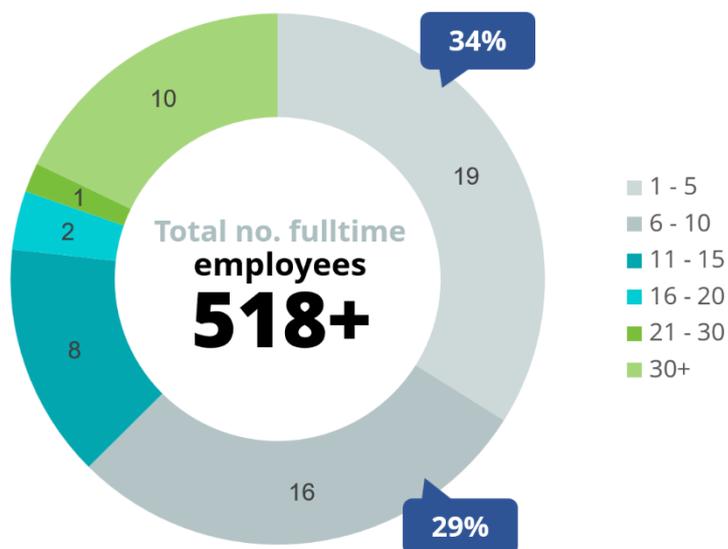
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05.13: Fulltime resources

The majority of ESO are currently operating with small, dedicated teams with 63% of the organisations running with teams of 0-10 team members.

Larger organisations incl. universities are reporting bigger fulltime teams yet it is believed that not all reported are dedicatedly working with supporting entrepreneurs.

The sector has the potential to employ a sizable number of people – especially young people which furthermore then can feed into other sectors such as the public sector, financial institutions as well as startups and SMEs.



05.14: Consultants and part-time resources vs. collaboration

The data shows that the more mature entrepreneurs that ESOs are supporting the more likely they are to work with and utilise (or depend on) non-full-time staff and consultants.

These external resources often bring diverse skill sets and expertise to the supported entrepreneurs. Leveraging this diversity can lead to more comprehensive and tailored support for entrepreneurs at different maturity stages.

On the flip side, it may keep organisations delivering on immediate projects at the expense of adequately investing in upskilling their team and hiring additional especially senior resources which support in building the organisational capacity. With a scarcity of right-skilled human resources with experience in supporting entrepreneurs the cost of such resources may be outside the actual or perceived scope of many ESOs.

When it comes to the degree at which ESOs collaborate with peers and other organisations then there is no correlation between size and stage of businesses supported. Collaboration could be or become an alternative and ecosystem building way of accessing additional and specialised resources.

05.15: Clear business model needed

The survey data indicates a strong relationship between how well ESOs' business and income model is defined and the maturity stage of entrepreneurs they focus on. Organisations with a well-defined business and income model are more likely to focus on mature entrepreneurs.

The ability to serve maturing entrepreneurs in their growth journey requires that ESOs themselves work on and have a strategic plan, clarity, and a defined business model. The logical need of practicing what you preach is confirmed by the data. As ESOs seek to grow and advance their

organisations alongside the services they offer they will need to work on and define their business models and income streams. External support and facilitation may be very helpful in this organisational capacity building process.

Table 7: Business and income model maturity

How defined is your business and income model	Frequency	% (of total)
Well defined	15	30%
Defined	16	32%
Being worked on	19	38%
Not defined	4	8%
Loosely defined	2	4%
Total	56	100%

05.16: More mature entrepreneurs equal higher budgets

There is a strong evidenced correlation between the ESOs' turn-over and the primary stage of entrepreneurs they support. ESOs focused on serving later-stage entrepreneurs have higher annual turnover than peers primarily supporting for example idea stage entrepreneurs.

The financial health and sustainability of ESOs are indicative of effective resource mobilisation and management. Whereas the level and seniority of support required grows with the maturity of the entrepreneur's business so does the cost of providing such support hence the budgets of accelerators for example are assumed to be higher than those of incubators. As the maturity of the businesses supported

Whereas early-stage support ESOs are located across Ethiopia then later stage support is concentrated in the biggest cities and ultimately in Addis Ababa. Here a higher cost infrastructure than in secondary cities or tertiary towns contributes to the higher budgets. The data suggests that organisations with more financial resources have more resources at their disposal, enabling them to provide more comprehensive and impactful support to entrepreneurs.

Organisations with a higher financial turnover can according to the data design and implement more demanding and impactful projects and programs leading to the advancement of entrepreneurs to higher maturity stages. The resource mobilisation is as described earlier linked to this segment of ESOs having a (more or fully) defined business and revenue model.

05.17: Addis and big cities in focus

With a larger density and pool of potential and actual entrepreneurs Addis Ababa and the largest cities are the key focus of ESOs at this point. The larger cities and especially Addis Ababa have more available resources alongside a more developed business ecosystem. Access to funding and finance, talent, government and other partners makes Addis Ababa the logic center for the ecosystem to develop and grow from.

Table 8: Targeted geography

Geography targeted	Frequency	% (of total)
Addis Ababa (capital city)	32	57%
Largest 10 cities	14	25%
Urban areas (beyond the largest 10 cities)	2	4%
Peri-Urban	3	5%
Rural	2	4%
Not applicable	3	5%
Total	56	100%

Fourteen organisations (23%) extend their activities to the ten largest cities. This indicates a focus on urban areas but not exclusively on the capital city. It suggests a recognition of the potential in these urban centres for entrepreneurial development. Only 2 organisations (3%) target urban areas beyond the ten largest cities. This choice may reflect a desire to tap into secondary urban markets with growth potential.

Three organisations (5%) target peri-urban areas. Peri-urban regions often represent a mix of urban and rural characteristics, and targeting these areas suggests a broader approach to entrepreneurship support. Two organisations (around 3%) focus on rural areas. While less common, this focus is critical for supporting entrepreneurship in underserved and economically challenged rural communities.

Overall, the data show that a significant portion of surveyed organisations concentrate their efforts in the capital city, possibly due to the perceived advantages of a more developed urban environment. However, a notable proportion also recognises the potential in other urban areas, peri-urban regions, and rural communities, indicating a diverse and inclusive approach to entrepreneurship development across different geographical contexts. It's also important to note that a few organisations didn't specify their area targeting strategy, which may require further investigation to understand their focus.

05.18: Funding entrepreneurs

With the emphasis on unlocking and providing very essential growth financing to startups and early stage ventures it was examined whether and to what degree ESOs are providing financing to their entrepreneurs.

Approximately 43% of the ESOs reported that they invest in entrepreneurs using external or

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partners' funds. It points to the interest and attention this aspect of supporting entrepreneurs have.

A surprising 32% of the respondents reported that they invest in entrepreneurs using their own finances. It would indicate that there is a strong commitment to support and nurture entrepreneurs. It is not clear how much and how these organisations are financing this funding, or the size of the financing provided.

Table 9: Financing entrepreneurs

Invest in entrepreneurs	Frequency	% (of total)
Yes (from external / partners' funds)	19	43%
Yes (from own finances)	14	32%
No	11	25%
Total	44	100%

05.19: Training facilities

The majority of the surveyed ESOs have space and facilities that would allow them to conduct training and workshops for entrepreneurs.

Table 10: Inhouse training facilities

Inhouse training facilities	Frequency	% (of total)
Yes - for up to 20 people	12	21%
Yes - for up to 30 people	10	18%
Yes - for up to 50 people	7	12%
Yes - for more than 50 people	11	20%
No	16	29%
Total	56	100%

The diversity in facility sizes allows organisations to customise training programs to meet the specific needs of different groups, whether they are small teams or larger gatherings. Organisations with limited resources may benefit from focusing on training facilities that cater to their immediate needs, ensuring efficient use of available resources.

At high volume and short programmes typically for the idea- and very early stage activities there is a clear value in commanding own facilities. At later stages with smaller cohorts, longer programmes and more individualised support the focus on having own workshop facilities should be less – and there should rather be a focus on utilising space at other ecosystem players. There is a risk of over emphasising the need for everyone having their own space when the more effective model for the ecosystem is to collaborate and rent space among ecosystem players whereby for example accelerators rent space with coworking spaces. This assumes that prices and collaboration along with the quality of facilities have been established.

05.20: Services provided by non-fulltime staff / consultants

The vast majority of the support provided by external resources are directed towards training or supported to the entrepreneurs. This accounts for 81% of the effort.

Table 11: Services by non-fulltime staff / consultants

Services by non-fulltime staff / consultants	Frequency	% (of total)
Environmental and social management systems	1	2%
Facilitation of workshops	1	2%
Mentorship / coaching	2	4%
Working for the University	1	4%
Support of organisation (leadership, operations, comms etc.)	5	9%
Training of entrepreneurs	42	75%
Not applicable	4	7%
Total	56	100%

Pairing this data with the general revenues is it assumed that most organisations are not able to pay for external resources to support them with activities which are not directly earning revenue to the ESO.

There can be a risk of ESOs not building their own inhouse, fulltime teams but instead relying heavily on external consultants which then are hired in on a needs' basis. Whereas this may be the right short term business model it doesn't allow the ESO to build the long term and more experienced team required to advance the organisations, its services and the quality of support to the entrepreneurs. It has the risk of becoming a vicious circle and reduce the ESO to a project management entity with minimal execution capabilities.

05.21: Collaboration efforts

An encouraging large share of activities is done in collaboration with other organisations. The data does though not provide information on whether this is with industry peers indicating that there is more collaboration than perceived / actual competition stifling a collaborative ecosystem. Observations of the ESO ecosystem and a review of the winners of tendered projects would indicate that ESOs still have some way to go in terms of collaborating among themselves on different activities. It is though also evident that there are an increasing number of activities where peer organisations have come together for the delivery of a project / programme. The reasons for this can be tender requirement, need to close gaps, add required resources or from a genuine believe that a collaborative effort will deliver the best value to the entrepreneurs.

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Table 12: Degree at which activities are done in collaboration with other organisations

Portion of activities in collaboration with peers	Frequency	% (of total)
0	5	9%
1 - 10%	9	16%
11 - 25%	14	25%
25 - 50%	14	25%
51 - 75%	2	4%
76 - 100%	12	21%
Total	56	100%

05.22: Anyone more likely to collaborate

An analysis of the relationship between type of organisation (eg. Incubator, accelerator etc.) and the degree of collaboration indicates that 11% of the variance the degree of collaboration is explained by the type of organisation. The analysis suggests a weak relationship between the type of organisation and the extent of collaboration with other entities.

05.23: Geographical location and other key factors

An analysis was done to explore whether and where geographical location may influence the setup of ESOs. The below are some of the correlations tested.

Table 13: Correlation of geographical location and other key factors

Correlation of geographical location on ESO associated factors	Frequency factor variation explained by geographical location %
Services provided by non-fulltime staff / consultants	14%
No. of fulltime female staff	50%
How defined the business and income model for the organisation	62%
No. of non-fulltime / consultants / part-time / freelancers	51%
Organisation and type of organisation	35%
Support currently provided to entrepreneurs	51%
Sector focus	44%
Primary maturity stage of entrepreneurs	38%
Membership of any networks / associations	22%
Portion of activities done in collaboration with other organisations	27%
Presence of inhouse training facilities	46%

The table above provide the coefficient of determination values, expressed as the percentage of variation explained by the geographical location for various variables in the study. The findings:

- Services provided by non-fulltime staff / consultants: Geographical location explains 14.3% of the variation in the services provided by non-fulltime staff / consultants. This suggests that location plays a very moderate role in influencing the type of services offered by these individuals or consultants – generally they will be providing training of entrepreneurs.
- No. fulltime female staff: The geographical location explains a substantial 50.3% of the variation in the number of fulltime female staff. This indicates that the region significantly impacts the employment of female staff in the organization. ESOs in the capital are more likely to have female team members. This likely amplified by access to talent as well a funder emphasis on gender balanced teams and deliveries,
- Extent to which the business and income model for the organisation is defined: Location explains a substantial 61.7% of the variation in how well the business and income model for the organisation is defined. Geographical location is a strong predictor of the clarity of the business model. Organisations outside of the Addis are less likely to have their models defined – possibly because they are younger, operate in more volatile and emerging environments.
- No non-fulltime / consultants: Geographical location explains 50.8% of the variation in the employment of non-fulltime staff / consultants. Big city ESOs are more likely to use and work with external resources. This may be explained by such resources being more easily available in Addis Ababa, availability of budget and culture of using externals.
- Type of organisation: Geographical location explains 34.6% of the variation in the type of organisation. This would for example indicate that ESOs supporting later stage ventures are only / primarily found in Addis Ababa.
- Sector focus: Geographical location accounts for 43.7% of the variation in the sector focus of the organisation. Logic here would be that ESOs outside the biggest cities are more likely to run agribusiness activities whereas ESOs in Addis Ababa and the biggest cities are more likely to run tech focused programmes.
- Primary maturity stage of entrepreneurs served: A significant 37.5% of the variation in the primary maturity stage of entrepreneurs is attributed to geographical location. This would indicate that there are more mature entrepreneurs in the big cities whereas less urban and rural locations are centered on early-stage entrepreneurs.
- Presence of In-house training facilities: 46.01% of the variation in the presence of in-house training facilities is accounted for by geographical location. ESOs are more likely to have own facilities in the bigger cities.

The findings suggest that geographical location has varying degrees of influence on different aspects of the organisation's operations. Some variables, such as the number of full-time female staff, the number of full-time team members supporting entrepreneurs, and the definition of the business and income model, are strongly influenced by location. On the other hand, variables like the presence of in-house training facilities show a moderate impact from location. Understanding these relationships can help organisations make informed decisions based on their specific context and location.

06: Developments

Resilience, perseverance, government focus, startup act and university incubators are just a few of the keywords describing the ecosystem and what has and continue to influence its development.

It is an ecosystem on the move, with fast growth and expanding geographical reach. It has its own dynamics with a supporting government and key ministries alongside a set of loyal funders.

Despite very challenging external circumstances caused by COVID-19 and then the internal conflict which robbed the ecosystem of international support and funding as donors pulled back then the ecosystem as almost always is the case with entrepreneurs showed its resilience.

- **Increased government support**
The government has shown an increasing commitment to fostering entrepreneurship. Initiatives like setting up the Ethiopian Investment Commission and various policy reforms aimed at improving the business environment have been significant. The efforts include simplifying business registration processes and offering tax incentives.
- **Growth of incubators and accelerators**
There has been a notable increase in the number of incubators and accelerators in Ethiopia. These organizations provide crucial support to startups, including mentorship, training, and access to networks and funding.
- **Access to finance**
There's been an improvement in access to finance for startups and small businesses. The emergence of venture capital firms and angel investors have provided new funding avenues. Banks are also increasingly offering products tailored to SMEs.
- **Technological advancements**
Ethiopia's digital infrastructure has been improving, making it easier for entrepreneurs to access online resources, market their products, and conduct business. The rise of mobile money and digital banking services has also facilitated easier transactions.
- **Educational and training programs**
There has been an increase in educational programs focused on entrepreneurship. Universities and private institutions are offering courses and workshops that equip aspiring entrepreneurs with the necessary skills to start and grow their businesses.
- **Int. partnerships and networking**
Ethiopian entrepreneurs are increasingly gaining access to international networks and partnerships. This exposure is vital for sharing knowledge, accessing global markets, and attracting foreign investment.
- **Focus on social entrepreneurship**
A growing emphasis on social entrepreneurship, with various initiatives supporting businesses that address social and environmental issues, reflecting a broader understanding of the role of business in society.
- **Women and youth empowerment**
Programs specifically targeting women and youth entrepreneurs have been on the rise, aiming to reduce barriers and promote inclusivity in the business sector.
- **Regulatory reforms**
The government has been working on regulatory reforms to ease the process of starting and operating a business. This includes the decriminalization of minor business offences and the streamlining of licensing procedures.
- **Growing startup culture**
There's a burgeoning startup culture in Ethiopia, with more people aspiring to be entrepreneurs. This cultural shift is vital for creating a robust entrepreneurial ecosystem.

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07: Challenges and opportunities: Top 10

Where there is significant growth and development there is learning and elevated challenges and opportunities. Success will to a large degree be a result of how these are anticipated and proactively addressed. While each ecosystem is unique valuable learning and insights can be drawn from other ecosystems and stakeholders.

From the research and our interviews some of the key challenges as well as - and more importantly - opportunities that the Ethiopian ecosystem of ESOs have are:

① ECOSYSTEM COLLABORATION

There is an understanding of the need for collaboration and coordination within the ecosystem of ESOs and with ecosystem stakeholders.

The formation and development of an inclusive network or association aimed at strengthening the capacity of ESOs and providing a joint voice for the sector should foster collaboration as a key focus. Capacity building activities aimed at strengthening ESOs' ability to deliver effective, impactful and quality support would then be the next step. The forming of the association EASE is one of the means to address this.

② ENGAGED GOVERNMENT

Key ministries are proactively working on initiatives to support and strengthen the ecosystem in collaboration and coordination with key funders.

While government and ministries are still exploring their exact role and responsibilities their deep involvement is encouraging and needed to collectively accelerate entrepreneurship in Ethiopia.

③ FUNDING AND BUSINESS MODELS

The level of funding is still relatively low for Ethiopia's size, the size of the sector and the emerging number of ESOs.

There is a need to mobilise more funding for entrepreneur support activities and developing sustainable ESOs. This will include developing and refining business models to match the external environment and ensuring financially sustainable business models for the ESOs.

④ UNIVERSITIES AS REGIONAL HUBS

Universities and institutions of higher learning are engaging strongly in the entrepreneurial development agenda and present a great platform for regional reach and support of developing the next generation of innovative and entrepreneurially minded people.

This provides an opportunity for an inclusive growth and development across the country and to connect research and innovation with entrepreneurship and business.

5 LEGAL REGISTRATION

To be eligible and attract more international funding Ethiopian ESOs will need to be registered as not-for-profit. This will require a transitioning from or if possible being registered as both a business and a non-profit entity – if administratively viable.

Many donors and philanthropic foundations restrict their funding to non-profits hence the need for this to unlock much needed resources.

6 BUILDING HUMAN CAPITAL

In a rapidly growing ecosystem experienced and rightly skilled human capital quickly becomes a key bottleneck.

There is a need to collectively address who are involved and responsible for ensuring that the ecosystem has the right human capital – along with enough supply whereby exceeding demand does not drive the cost up to unsustainable levels. Attention need to turn to how and who will fund this often-overlooked key component.

7 JOINT EFFORT TOWARDS FUNDERS

Dialogue with funders is largely done on a 1on1 basis rather than in consortiums of industry peers leveraging their experience and expertise into a larger joint resource with the ability to deliver at a larger scale and more sophisticated services and projects / programmes.

Joint efforts can be facilitated by and with EASE playing a convening role while ensuring that it does not take on an implementing role or compete with its current and potential members.

8 THE ETHIOPIAN STARTUP ACT

The act when passed represents exciting opportunities for supporting and structuring the ecosystem and efforts of supporting entrepreneurs. It should be viewed as a significant first step in an ongoing process.

Ultimately whether within and/or beyond the bill or subsequent bills there need to also be legislation passed to unlock much needed financing

9 DATA, INSIGHTS AND LEARNING

There is relatively limited information on the evolving Ethiopian ecosystem and all it drivers. There is a great interest from government backed by international donors to improve this.

The challenge is now to strategically plan and coordinate research and mapping efforts to derive optimal value. This includes involving multiple stakeholders in the process (beyond just providing data) and collaborative effort. Furthermore, research capabilities need to be strengthened and research project coordinated to eliminate duplication.

10 NEED TO BUILD EARLIER PIPELINE

Currently business “development” effort is focused on the incubation level supporting early-stage startups getting their business to market.

To ensure a steadily growing pipeline of qualified entrepreneurs there is a need to further strengthen, resource and financially incentivise the cultivation and development of entrepreneurs and ideas pre-incubation.

08: Reflections and considerations

There are actions at different levels and across different ecosystem stakeholders often in a collaborative and coordinated effort to further accelerate the ecosystem and its ESOs as the key engine in creating and developing entrepreneurial growth in Ethiopia.

We have compiled a list of reflections along with areas and actions to be considered especially by entrepreneur support organisations, government institutions, international development partners and funders.

① SHIFT FROM MORE TO BETTER ESOs – AND SUPPORT

As the number of ESOs have been growing over the past years across Ethiopia there is a need to start shifting focus from setting up more ESOs to resourcing and building the organisational and human resource capacity of the ESOs aimed at professionalising their internal structures, processes and systems alongside upskilling their teams. Ultimately this is to lead to different levels of specialisation and a pathway towards financial sustainability. The offering and support delivered to entrepreneurs is to gradually improve with this shift.

Government and funders will be instrumental in funding and supporting this leap forward. It will require specific, dedicated funding and capacity building should be built into projects rather than assuming that projects by their mere execution will lead to enhanced capacity.

ESOs will be required to build the right internal systems, processes and structures to acquire, deploy and manage increased funding and financial resource. Governance and reporting resources will need to be set up and strengthened.

② FROM PHYSICAL INFRASTRUCTURE TO HUMAN CAPITAL AND PROGRAMMATIC INFRASTRUCTURE

With the many new ESOs in Addis Ababa and in secondary cities plus embedded with government universities across the country the physical infrastructure is coming into place. Now the focus needs to shift to building and advancing the actual activities and human resources equipped to deliver the activities.

As entrepreneurship and even more so entrepreneurship support are emerging sectors the demand for qualified and experienced entrepreneur supporters vastly outstrips the supply.

There is a very urgent need to address this human resource gap which is likely to otherwise be a key bottleneck or outright deaccelerator to the plans for growing Ethiopia through entrepreneurship.

There are plenty of enthusiastic talented young people interested and ready to join the ESOs but at large they lack the practical tools, skills and experience required to support

especially post-revenue entrepreneurs. The ecosystem will with the support of funders and government need to grow this talent pool “on the job”.

In a day and age where everyone unchecked can claim that they are running an incubation or acceleration programme based on patched together content downloaded from the internet there is a need to support especially smaller ESOs without the capacity or resources to develop own content and methodology with centrally developed content. BIC Ethiopia is an example of such an initiative.

③ ASSOCIATIONS TO BE ANCHORED IN ORGANISATIONS – AND POWERED BY INDIVIDUALS

As entrepreneurial ecosystems are comprised of a broad gallery of organisations and individuals there is a need for bringing together organisations supporting their strategic and organisational needs – and then separately create activities that bring together the individuals which ultimately makes up ESOs and the ecosystem.

Networking and getting to know each will be key in building trust and the very relations that makes organisations collaborate.

④ COUNTRYWIDE, INCLUSIVE ECOSYSTEM

With especially universities across the countries setting up incubation and entrepreneur support activities the physical infrastructure is there to develop a geographically inclusive and

much needed support beyond Addis Ababa and the major cities.

Entrepreneurship and growth is needed across the country and across different fields of inclusivity – whether on gender, disability or youth.

Collaboration should be encouraged between universities and ecosystem peers to strengthen their capacity and access to the latest entrepreneur support resources.

⑤ DEVELOP WHAT WORKS FOR ETHIOPIA AND LEARN FROM RELEVANT, RELATABLE PEERS

Learn from others and connect with the people, organisations and ecosystems that have valuable data, learning and insights. Learn from their mistakes and successes – from what and how they have done things. Cherish that Ethiopia is its very own yet also recognise that the ecosystem in many aspects is similar to other ecosystems. Different but similar.

Identify and pursue where the ecosystem can learn from regional, continental, and international peers and partners. It will be a balancing act to develop what works for Ethiopia’s uniqueness while building on relevant experience and learning made by others. Successful ecosystems like the American can in many/most aspects not be duplicated or perhaps even contextualised to fit into an Ethiopian reality.

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