

Private Sector Development (PSD) in Ethiopia

Overview of Dutch efforts 2005-2011



Inspectie Ontwikkelingssamenwerking en beleidsevaluatie (IOB)

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Introduction

This document is written in the context of the policy review on Private Sector Development of IOB. Four country studies on the policies and effects of PSD policies are part of this policy review. Ethiopia is one of these four, together with Bangladesh, Vietnam and Burundi. This document provides a general overview of Dutch efforts on PSD in Ethiopia in the period 2005-2011. As such, this preliminary study functions as a starting point for the elaborate country study that will be carried out in 2012. The central questions for this elaborate country study are:

- 1. To what extent was the Dutch PSD policy aligned with (1) the national policy of Ethiopia and (2) internally coherent?*
- 2. To what extent has the Dutch PSD program in Ethiopia been driven by the demand from actors in Ethiopia?*
- 3. What (possible) effects of the Dutch PSD program can be established at enterprise level and if possible, beyond this level?*

The Terms of reference of the policy review and the country studies can be found at www.minbuza.nl/iob/psd.

This report starts with a short introduction on Ethiopia's political and economic context. In the second chapter, the Dutch involvement with PSD in Ethiopia in general will be discussed. In the following chapters the activities of the Dutch embassy in Ethiopia, the different departments of the Ministry of Foreign Affairs and the various Dutch organizations that contributed to PSD during the period 2005-2011 will be outlined. The last chapter will contain recommendations and points of attention for the study and mission that will take place.

All information in this report is based on interviews (see annex for a full list), literature and official records (see reference list). All used sources and reports of interviews are available at IOB and can be presented upon request. IOB is fully responsible for the information presented in this document. IOB would like to thank all respondents for the cooperation in this preliminary study.

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1. History and economic context of Ethiopia

1.1. Introduction

Ethiopia is located in East Africa and is surrounded by Sudan, South Sudan, Eritrea, Somalia, Djibouti and Kenya. Currently, the estimated population of Ethiopia is 80 million people and around 80% of the population lives in rural areas.¹ Ethiopia is a decentralized state and counts 9 ethnically based states and 2 self-governing administrations. Regions are divided into zones and *woredas* (districts). *Woredas* are divided into *kebeles*, the lowest administrative units with an elected council. The official languages are Amharic, English and Arabic.²



Figure 1: Map of Ethiopia

Despite colonisation in the rest of Africa, Ethiopia remained independent, except from a short period of Italian invasion (1936-1941). Politically, Ethiopia's history is colored by the domination of the reign of Emperor Haile Selassie (1930-1974) and the dictatorship of Mengistu Haile Mariam (1974-1991), also known as the *Derg* and guided by Marxist-Leninist theories and policies. In 1991 the Derg was overthrown by the *Ethiopian People's Revolutionary Democratic Forces* (EPRDF) and the political system developed into a parliamentary system.³ The first democratic elections were held in 1995, after the constitution has been written in the year before. However, the parliamentary elections in May 2010 resulted in a 99,6% victory for the ruling EPRDF. This reduced the opposition from 174 to two of the 547 seats in the lower house.⁴ Since 1995, Meles Zenawi is prime minister of Ethiopia.

Ethiopia is stable country in a fragile regional setting. However, multiple internal challenges such as increasing drought and pressure on natural resources exist. There are risks of spill-over of conflicts from across Ethiopia's borders. Ethiopia played an important role in both the Somali crisis and in peace-brokering between Sudan and South Sudan. From 1950 to 1993, Eritrea was part of a federation under Ethiopian government. Eritrea gained independence in 1993 after a long period of conflict. Between 1998 and 2000 the conflict started again, and until now the peace solutions are fragile and tensions persist.⁵

Poverty rates in Ethiopia are quite high. Ethiopia ranks 174 out of 187 on the Human Development Index of 2011.⁶ Average life expectancy at birth is 59,6 years and in 2008

¹ Ministry of Finance and Economic Development (2006), Ethiopia: Building on Progress - A Plan for Accelerated and Sustained Development to End Poverty (PASDEP) (p. 161)

² Central Intelligence Agency, 'The World Factbook: Ethiopia' (version 11-01-2012), <https://www.cia.gov/library/publications/the-world-factbook/geos/et.html> (07-0-2012)

Ethiopia - European Community (2007), Country strategy paper and national indicative program 2008 - 2013, http://ec.europa.eu/development/icenter/repository/scanned_et_csp10_en.pdf

³ Ethiopia - European Community (2007), Country strategy paper and national indicative program 2008 - 2013, http://ec.europa.eu/development/icenter/repository/scanned_et_csp10_en.pdf (p. 12-13)

⁴ World Bank Country in brief - <http://go.worldbank.org/WA1RL120L0>

⁵ See timeline on the website of the BBC for an overview of the latest years.

⁶ <http://hdrstats.undp.org/en/countries/profiles/ETH.html>

42% of the population lived below the poverty line of 1.25 dollar a day.⁷ The GINI index, the indication for distribution of income, declined from 40 in 1995 to 30 in 2005.⁸

1.2. Economic situation

Half of the production in the Ethiopian economy consists of agriculture, almost 40 percent is services and the last part is industry.⁹ In the last decade, Ethiopia has been one of the fastest growing economies in Africa. This economic performance came under threat of high inflation and a difficult balance of payments in 2008 and 2010. These problems were exacerbated by the high fuel and food prices in the global market. One example of these problems can be found in the inflation of food prices: in the period 2008-2010 this quadrupled from 12.8 percent to 47.4 percent per year.¹⁰ Table 1 shows the main economic indicators over the last years. More information on economic indicators can be found in Annex 1.

Indicator	2005	2006	2007	2008	2009	2010
GDP per capita (PPP) (current US\$)	\$636	\$711	\$798	\$883	\$957	\$1041
GDP per capita growth (annual %)	9,20	8,31	8,98	8,38	6,46	7,80
Foreign direct investment, net inflows (% of GDP)	2,15	3,60	1,14	0,41	0,69	0,62
Inflation, consumer prices (annual %)	11,61	12,31	17,24	44,39	8,47	Unknown
Import of goods and services (% of GDP)	35,48	36,59	32,03	30,83	28,91	32,48
Export of goods and services (% of GDP)	15,10	13,88	12,73	11,40	10,58	11,41
Net ODA received per capita (current US\$)	\$26	\$26	\$33	\$42	\$47	Unknown
Ease of doing Business (total number of countries: 183)	Unknown	101	97	102	116	107

Table 1: Main economic Indicators (source: World Bank and IFC's Doing Business reports)

Ethiopia's main export product is coffee, although the export has begun to diversify in the last years. One example of this diversification is the growth in floriculture and horticulture exports.¹¹ Other export products are leathers, pulses, oilseeds, khat, sugar and gold.¹² The main import product is petroleum. Import and export are highly regulated by the national government. The private sector in Ethiopia is 'still in its infancy, the state takes a strong role in the development process, but as it has a hold on most resources, its risks 'crowding out' the private sector.'¹³

To understand the economic situation, these numbers need to be placed in a larger context. For example, growth in the agricultural GDP was around 1,4% in the last 40 years, caused by among others several severe droughts, which wasn't enough to keep track with the population growth in this period. The combination with the governmental problems led to a

⁷ MASP 2008-2011

⁸ World Bank Data

⁹ Ethiopia at a glance – World Bank

¹⁰ Country in brief – World Bank <http://go.worldbank.org/WA1RL12OL0>

¹¹ idem

¹² <http://www.state.gov/r/pa/ei/bgn/2859.htm>

¹³ MASP 2012-2015, p. 7.

decline of the living standard of the Ethiopians, to serious famines and chronic food insecurity.¹⁴ Despite these problems, and as stated before, the Ethiopian economy grew fast in the last decade. According to the European Commission, this was mainly due to the following reasons:

- The economic policies and strategies implemented by the Government;
- The peace dividend after the end of the conflict on the Eritrean border, coming from a reduction in defense spending from 13% of GDP in 2000 to 2.7% now;
- The virtual tripling of Official Development Aid (ODA) for Ethiopia, rising from US \$370 million in 2000 to US \$937 million in 2004, raising the share of ODA in Ethiopia's Gross National Income (GNI) from 4.7% in 2000 to 9.9% in 2004¹⁵;
- The receipt of external debt relief under HIPC and from the IMF, which reduced the burden of paid external debt service on Ethiopia's GDP by over 2%.¹⁶

These reasons provide a brief overview of the broader developments in Ethiopia. As the aim of this study is not to provide an elaborate analysis of economic development or development assistance to Ethiopia, more information can be found in the references mentioned in this paragraph.

Economic relations with the Netherlands

The Dutch Ministry of Foreign Affairs states the following about the economic relations between Ethiopia and the Netherlands: 'Economic relations between Ethiopia and the Netherlands are good. Since 2003, spurred on by Ethiopia's major agricultural potential, many Dutch entrepreneurs have set up businesses in the agriculture and horticulture sector, taking particular advantage of the favorable climate and tax incentives. Ethiopia's infrastructure is also good enough to enable it to compete with countries like Uganda and Kenya. Dutch businesses retain control over their own production, transport and sales. Now, Dutch companies active in other sectors are also investing in Ethiopia. They include car assembly and cosmetics.'¹⁷ An analysis of Dutch trade statistics with Ethiopia affirms this statement and is broadly in line with the general sectors of export as stated in this paragraph.¹⁸

1.3. The PSD policy of the Ethiopian government

Ethiopia started the Poverty Reduction Strategy Paper (PRSP) process in 2000, and by 2002 had issued the first three-year Sustainable Development Poverty Reduction Programme (SDPRP), which covered 2002-2005. In 2005, Ethiopia launched the first five-year Plan for Accelerated and Sustainable Development to End Poverty (PASDEP) carrying forward the SDPRP strategic directions but also bringing in new elements and scaling up the efforts to achieve the Millennium Development Goals (MDGs). The PASDEP contains seven main points to strengthen economic growth and reduce poverty in the period 2006-2010:

- Putting stronger emphasis on poverty reduction through economic growth acceleration, accelerating market-based agricultural development and strengthening social sector service delivery;

¹⁴ Ethiopia – European Community (2007), Country strategy paper and national indicative program 2008 – 2013, http://ec.europa.eu/development/icenter/repository/scanned_et_csp10_en.pdf (p. 16-17)

¹⁵ Note that Ethiopia received 3,5 billion dollar ODA in 2010 – Aid at a glance, OECD

¹⁶ idem

¹⁷ <http://www.minbuza.nl/en/key-topics/development-cooperation/partner-countries/countries-alphabetically/e>

¹⁸ CBS Statline

- Embracing the private sector, accelerating export growth and reducing the country's infrastructure gap;
- Pursuing the urban agenda and strengthening rural-urban linkages;
- Strengthening human resource development and decisively reducing high population growth;
- Unleashing the productive potential of Ethiopia's women;
- Arresting environmental degradation; and
- Strengthening economic and democratic governance.¹⁹

These points are worked out in the PASDEP. The majority of the points relate strongly to private sector development. The main points of action are improvement in agricultural production, encouragement of traditional exports such as coffee and stimulation and diversification of non-traditional exports, introduction of credit rating for banks, improvement of the coverage of MFI's, better linkages between agriculture and industry and better competitiveness of Ethiopia on the international market.²⁰ The emphasis is put on agriculture and the assumption is that agriculture leads to growth of the industrial sector and this leads finally to development. Another point of importance is that during this period 'the pace of privatization of public enterprises will be accelerated'²¹, which will provide more space for entrepreneurs to develop their own business and makes the private sector less dependent on the government.

The PASDEP was a fairly ambitious plan. One of the main aims is to 'increase per capita income of citizens so that it reaches at the level of those in middle-income countries in the coming 20 years.'²² Therefore, the underlying assumption is yearly growth in GDP with 7%. The Development Assistance Group (DAG), in which the main donors of Ethiopia are organized, questions this ambitious assumption. In the Growth and Transformation Plan (GTP), the successor of the PASDEP, the Ethiopian government stated that they realized this ambition, as their economy grew in the period of the PASDEP with 11% per year.²³ On PSD in the PASDEP, the DAG welcomes the continuation of the reforms for PSD of the SDPRP and puts forward that even more is needed to support the private sector as engine of economic growth. Moreover, the DAG would like to see more reforms in the sphere of the enabling environment, to ensure property ownership, equality of rights for foreign and domestic companies and tolerable levels of risks for doing business.²⁴

The Growth and Transformation Plan (GTP) was launched in 2010 for the period 2010-2015. This plan was again very ambitious, and implementation of the plan is a challenge for the governmental bodies involved. Another point of concern of the donor community is the strong government regulation of the economy, which could hamper sustainable growth.

1.4. Donors on PSD in Ethiopia

In 2010 Ethiopia received 3,5 billion dollar ODA from OECD-DAC donors. The Netherlands provided 40,8 million dollar ODA in 2010 and was the 8th bilateral donor on the list of OECD

¹⁹ Ministry of Finance and Economic Development (2006), Ethiopia: Building on Progress - A Plan for Accelerated and Sustained Development to End Poverty (PASDEP); Ethiopia – European Community (2007), Country strategy paper and national indicative program 2008 – 2013,

http://ec.europa.eu/development/icenter/repository/scanned_et_csp10_en.pdf (p. 25)

²⁰ PASDEP chapter 7

²¹ Idem, p. 155.

²² <http://www.mofed.gov.et/English/Information/Pages/NationalDevelopmentPlan.aspx>

²³ GTP 2010, p. 12 – 'overall real GDP' is reported by the government. Growth rates for GDP per capita are slightly different, see table 1.

²⁴ http://www.dagethiopia.org/index.php?option=com_content&view=article&id=14&Itemid=40, p. 5

countries.²⁵ For the years 2000-2006 on average 40% of the yearly ODA of OECD-DAC donors was allocated for PSD.²⁶ As mentioned in the previous paragraph, the donor community is organized in the Development Assistance Group (DAG).

The donor community on PSD in Ethiopia is organized in the *Ethiopia's Private Sector Development & Trade Technical Working Group* (PSD&T TWG - part of the DAG). In the group bilateral and multilateral donors are united, among which the AfDB, the EC, USAID, UNIDO, UNDP and IFC. As bilateral donors, Canada, Germany, Japan, The Netherlands (the Embassy and SNV) and Sweden take part. The group serves to share information, reduce redundancies, increase collaboration, improve the relations with the Ethiopian government, track progress on common indicators and coordinate the support.²⁷ The Dutch organizations SNV and Agri-profocus chaired one of the (sub)working groups for some years.

1.5. Binding constraints

One of the main documents which list the mayor challenges of the private sector is IFC's Doing Business. In 2010 the main challenges for launching a business in Ethiopia were²⁸:

- Lengthy licensing procedures;
- High level of minimum capital requirement in some businesses;
- High government involvement in most economic regions;
- Services and trade sectors – difficult for foreign investors to enter;
- Government control over utilities, telecom and other mayor services;
- Financial sector is blocked for foreign ownership;
- Land is owned by government and can be leased on a long term basis of up to 99 years; and
- Acute shortage of foreign exchange/hard currency.

These constraints are mirrored in the ranking of Ethiopia on the list of Ease of Doing Business (IFC). In 2011, Ethiopia was on place 111 of 183 countries. For 2011, Ethiopia was ranked as number 111 of 183 countries.

In 2011, the picture is slightly different, as shown in the web of constraints of this year (figure 2²⁹). A high score (e.g. 0-20) on a certain issues indicates that there are hardly any constraints in this part of the business climate. As can be seen in the web in figure 2, trading across borders and getting credit were the main constraints. The first constraint is also put forward by the Ethiopian government in the PASDEP: '...limitation on implementing capability and shortage of finance are the major challenges faced during the plan period'.³⁰ The government ensures appropriate policies and strategies to deal with this issue. No specific plan is launched to improve regulations for trading across borders.

²⁵ OECD Statsextracts

²⁶ Overview of ODA per sector (Agriculture, roads, trade and communications, industry) in Accelerating Development in Ethiopia - Suggested Road Map for Scaling Up External Financing and Aid - Prepared for consideration by the Government of Ethiopia and the Development Assistance Group of Ethiopia (2007)

²⁷ Ethiopia PSDT TWG Report 2010, www.dagethiopia.org .

²⁸ Doing business 2010

²⁹ Doing Business 2012 – country profile Ethiopia, p. 8.

³⁰ PASDEP (2006) , p. 150

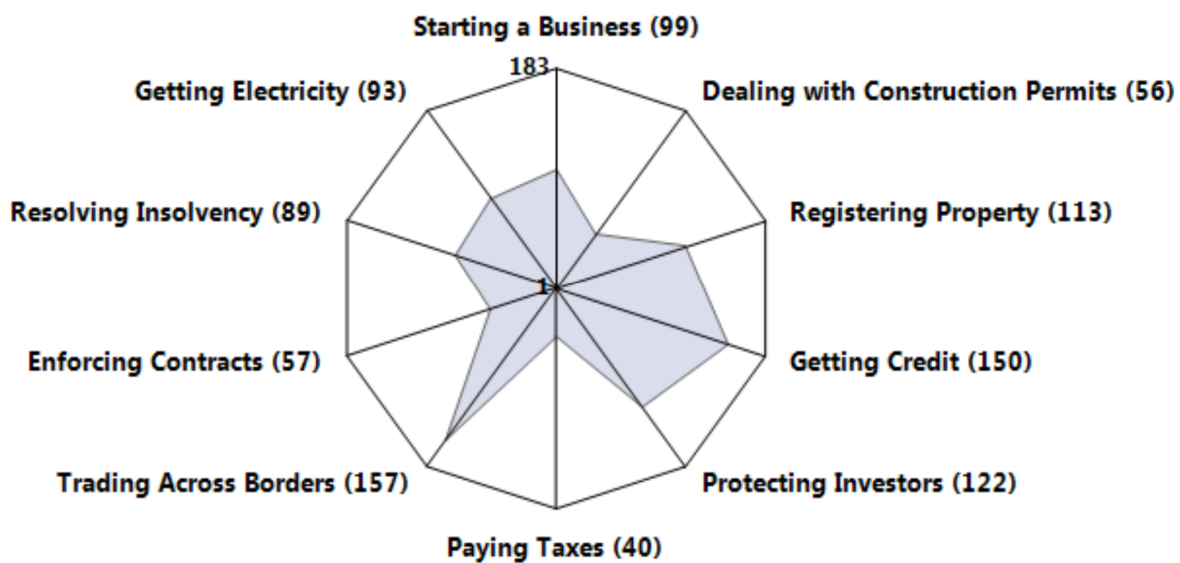


Figure 2: Binding Constraints Ethiopia 2012 (Doing Business)

In 2011, the Dutch Embassy studied the main binding constraints for Dutch entrepreneurs in Ethiopia. Although this study focuses not primarily on the development of the Dutch private sector in Ethiopia the main points provide an illustration of the general problems with foreign investment in Ethiopia. The study concludes that the level of bureaucracy is increasing and that there is arbitrariness and inconsistency in the implementation of procedures. In addition, most entrepreneurs experience a lack of transparency, clarity and predictability on which procedures to follow. A last general concern relates to the level of service of public and private sector providers. This is inadequate or absent. Beside these general concerns, detailed points about speed and efficiency, transparency and consistency, rigidity and suspicion are worked out in the report.³¹

³¹ Doing Business in Ethiopia – Views and Recommendations of Dutch companies (2011)

2. Overview of Dutch policies on PSD in Ethiopia

The Netherlands has an embassy in Ethiopia since 1950 and maintains development relations with this country since that time.³² In this chapter, the general lines of Dutch policy on PSD will be sketched. These general lines will be worked out in detail in the following chapters.

For the current Dutch development policies, Ethiopia is a 'profile 1' country in which the achievement of the MDGs is central. The Focusbrief of Minister for European Affairs and Development Cooperation Knapen explains why Ethiopia is one of the partner countries of The Netherlands and belongs to 'profile 1': Very low income and many possibilities for the themes water, food security, SRHR and security. Although many donors are active in Ethiopia and the influence on government policy is limited, there is broad appreciation of the Dutch effort, in particular because of the innovative character and the involvement of the Dutch business sector (as a unique selling point compared to other donors). Other reasons for the Netherlands to be active in Ethiopia are the limited political freedoms in Ethiopia, the small basis for tax raising because of the limited private economy, the good development results and strong executive powers. Last but not least, The Netherlands considers the role of Ethiopia in the Horn of Africa as important for both the economic and the security situation.³³

The Netherlands also applies a regional approach for the Horn of Africa as set out in several policy letters.³⁴ For this region, both the control of conflicts and development of the region in general are focus point. Characteristics of the region are chronic instability, due to internal and cross border conflicts, and in relation to the conflicts a strong pressure on food security and severe poverty. Since 2004, one of the focus points for this area is the promotion of pro poor economic development, of which PSD is part.³⁵ Main policy instruments for this part of development are promotion of investments by Dutch businesses, public-private partnerships and trade missions, combined with the 'common' instruments for businesses (PSOM/PSI, PUM etc.). The policy letter on the Horn of Africa of 2004 emphasized as well that attention needed to be paid to bottlenecks in the enabling environment.³⁶

In 2011, Minister Knapen launched a successor of this regional approach strongly related to the EU strategy for this region. Here, economic growth is one of the pillars. In general, the regional approach of Knapen for the Horn is more focused on security and legal order, whereas the previous focus was more on conflict in combination with development.³⁷

In total, The Netherlands spend almost 300 million euro in Ethiopia over the period 2005-2010 (excluding central programs). An overview of these expenditures per sector can be found in figure 2. Most of the time, food security is labeled as part of PSD. Taking business climate and food security together, 24% of the total expenditures are PSD and this makes 73,2 million euro.³⁸

³² <http://www.minbuza.nl/reizen-en-landen/betrekkingen/e/ethiopia>

³³ Focusbrief, TK 23605 2010-2011 nr. 2

³⁴ Sterke mensen, Zwakke Staten (2003), Hoorn van Afrika Notitie (2004), Brief over regionale benadering binnen ontwikkelingssamenwerking (2011)

³⁵ Hoorn van Afrika Notitie, p. 11.

³⁶ Idem, p.17

³⁷ Brief over regionale benadering binnen ontwikkelingssamenwerking (2011), p. 9.

³⁸ Piramide

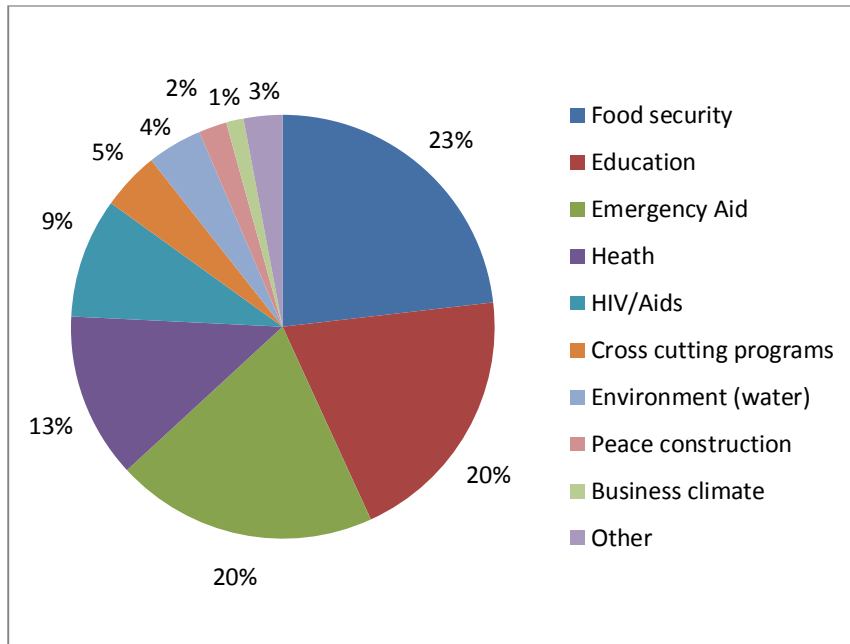


Figure 3: Expenditures in Ethiopia per sector (2005-2010) (excluding central programs and NGOs)

During the period under investigation in this study, both Minister for Development Cooperation Koenders and Minister for European Affairs and Development Cooperation Knapen visited Ethiopia. For Koenders, democratic developments were the main focus point during his visit in 2008. Koenders spoke with Prime Minister Zenawi about economic development. Zenawi mentioned The Netherlands as an example of promotion of local economic development by providing subsidies for the start of local enterprises. Some of these enterprises were owned by Dutch entrepreneurs and were mainly in horticulture. According to Koenders, these businesses also provided local employment and gave attention to corporate social responsibility. During his visit, Koenders signed a Memorandum of Understanding for a public-private partnership on oilseeds, with the aim to enable the Dutch employers' associations to support Ethiopian exporters in this sector and improve the quality and production of these seeds.³⁹

The visit of Knapen in 2011 took place in the context of the good achievement of the MDG's in Ethiopia and Knapen focused on the Dutch contribution in the areas of economic growth, food security and the opportunities created in these areas for Dutch business. Knapen noticed many opportunities for Dutch companies to invest in Ethiopia, especially in horticulture, agriculture and the dairy sector. The Ethiopians welcomed the Dutch focus on economic growth and investments by Dutch companies. Knapen emphasized the improvements needed in the enabling environment to improve foreign investments in Ethiopia. Besides these topics, Knapen also had conversations about the humanitarian situation, human rights and sexual and reproductive health and rights.⁴⁰

³⁹ Brief van de Minister voor Ontwikkelingssamenwerking, Verslag werkbezoek aan o.a. Ethiopie en Eritrea, 2 t/m 7 maart 2008, Kamerstuk 22831 58.

⁴⁰ Brief van de staatsecretaris voor Buitenlandse Zaken, Verslag van het werkbezoek aan Ethiopie en Somaliland, Kamerstuk 29237 139 (juni 2011)

In the remainder of this document, the various levels of the PSD program are described. The third chapter elaborates on the 'decentral level', e.g. the programs executed by the Dutch embassy in Addis Ababa. Chapter four describes the involvement of various departments of the Ministry of Foreign Affairs in The Hague, also called the 'central level'. This description is followed by an overview of the involvement of the central programs, among which PSOM/PSI, PUM and CBI are the main programs. Besides these programs, other organizations are also active on PSD in Ethiopia. A short inventory of the organizations which obtained support of the Ministry of Foreign Affairs can be found in chapter seven. This overview and preliminary analysis of the PSD program leads to some general observations and recommendations in the final chapters, to feed the mission which will study the program in depth.

3. Dutch embassy office in Ethiopia: decentral programs

3.1. Introduction

As stated before, the Dutch Embassy has been involved in Ethiopia for a long time. The Embassy is also responsible for the permanent representation of The Netherlands to the Africa Union. Over the years the focus of the Embassy program became focused on agricultural growth and food security, both related to economic growth and private sector development. In the period under investigation, most of the time 1 or 2 employees were responsible for this part of the program.

3.2. MASPs 2006-2011

An important part of policy on PSD in Ethiopia is worked out by the Embassy in their Multi Annual Strategic Plans (MASP). Two MASPs were written during the period under investigation, with the same strategic focus.⁴¹ PSD is not directly mentioned as one of the key areas, but is part of the main strategies. During both periods, the Embassy provided advice and support to Dutch companies in Ethiopia and linked them to relevant organizations in Ethiopia. These activities were ongoing and are not exactly planned in the MASPs.

In the period 2006-2008 the Embassy focused on good governance, poverty reduction and MDG's and regional stability. The second theme contains elements of PSD. The Embassy chooses to work on themes such as land certification and land use, improvement of agricultural markets and innovative cash for work practices. In addition, 'the embassy will also play a broker role between foreign investors and government and will use instruments like PSOM in a creative manner'.⁴² The Productive Safety Net Program (PSNP), a multidonor program for sustainable poverty alleviation, was developed to reach the 'poorest of the poor' (exact definition in this case unknown) and assist them with economic activities to release them from dependence on food aid. In a retrospective view, the Embassy concluded that it should work more on 'improving the enabling environment instead of focusing on stand-alone rural economic development projects in rural areas'.⁴³ Strong points related to PSD during this period were the 'integrated nature of Netherlands foreign, defense, economic and development policy' and the growing presence of Dutch investors. A weakness was the scatteredness of the portfolio.⁴⁴

The focus points for period 2008-2011 were governance (incl. human rights), sustainable growth and health/HIV Aids. Economic cooperation and trade promotion are mentioned as other issues. The intervention strategy for the second theme is aimed at restructuring donor-government dialogue, productive safety nets, smallholder farmers and three public-private partnerships (floriculture, oilseeds and seeds sector).⁴⁵ The program for PSD was centered on agricultural growth.

The review of this MASP in its successor mentioned mainly successful points. Increased self-sufficiency was achieved by the PSNP, the dialogue with the government was improved by working groups of the previous mentioned DAG and three public private partnerships were established under the World Summit on Sustainable development (WSSD). These PPPs

⁴¹ MASP 2008-2011, p. 7.

⁴² MASP 2006-2008, p. 14-15

⁴³ MASP 2008-2011, p. 7

⁴⁴ Idem, p.8.

⁴⁵ MASP 2008-2011

made a contribution to the understanding between public and the private sector, but concerns regarding the business climate remained. The central programs were useful in linking sectoral partners and lead to the attraction of more Dutch investors: 'Since 2004 over 50 Dutch companies started joint ventures in Ethiopia, bringing the total of Dutch companies to about 100.'⁴⁶

The Netherlands was an active member and in some periods also chair of the Donor Working Groups on PSD and another related Working group on rural development and food security. Under supervision of The Netherlands, this last group was transformed from a donor platform to a working group in which donors and the Ethiopian government cooperated.

3.3. Overview of programs and results

In the period 2005-2011 the Embassy planned to execute 16 (separate) programs in the area of Private Sector Development. Most programs were in the area of rural development and small business, as can be seen in table 2 where these programs are clustered. The strategy was to choose some large projects with a long term commitment and develop with other smaller project to explore new areas of working. The Embassy worked together in various multi-donor programs, cooperated with multilateral organizations (e.g. FAO, World Bank, IBRD, Unicef) and various NGO's (amongst others SNV, Farm Africa). In total an amount of 83,2 million euro is spend in this period. Figure 4 shows an overview of the development of the expenditures for the period 2005-2010.⁴⁷ For the majority of the programs, a start document ('bemo') is available at IOB. In this paragraph, a short description of the five largest (i.e. most budget) programs is presented. These five programs represent 76,9 million euro of the total expenditures (92,5%).

Project	Start	End	Budget in €
Productive Safety Net Program (PSNP) Food security (World Bank - IBRD coordinator)	2008	2011	44.200.000
Kaffa Development Program (support regional government)(incl cooperation with FAO)	2004	2011	10.231.337
Support to Business Organisation and their Access to Markets in Ethiopia (SNV)	2005	2011	8.328.796
Acceleration of water supply, sanitation and hygiene (UNICEF)	2007	2009	7.827.011
Public private dialogue and partnership activities (e.g. horticulture, oilseeds en seeds PPP)	2007	2012	6.357.656
Bale Eco-region Sustainable Management Programme (FARM Africa)	2006	2012	2.000.000
CASCADE - Capacity Building for Scaling up of Evidence Based Best Practices in Agricultural Production in Ethiopia (Wageningen University)	2010	2013	1.999.520
Trust Fund Support to Agricultural Growth (World Bank)	2009	2011	1.500.000
Plant Breeders Rights (Wageningen University)	2010	2012	440.000

⁴⁶ MASP 2011-2015, p. 4

⁴⁷ Based on Piramide data. Data for 2011 will be added when available.

CANGO - Path to self-reliance (Canadian Hunger Foundation)	2006	2008	202.729
Rural Urban Linkages in Ethiopia (research by International Livestock Research Institute)	2008	2009	45.385
Commercial activities (various)	2009	2012	25.000
Total			83.157.434

Table 2: Program overview Private Sector Development 2005-2012 (de-central programs)

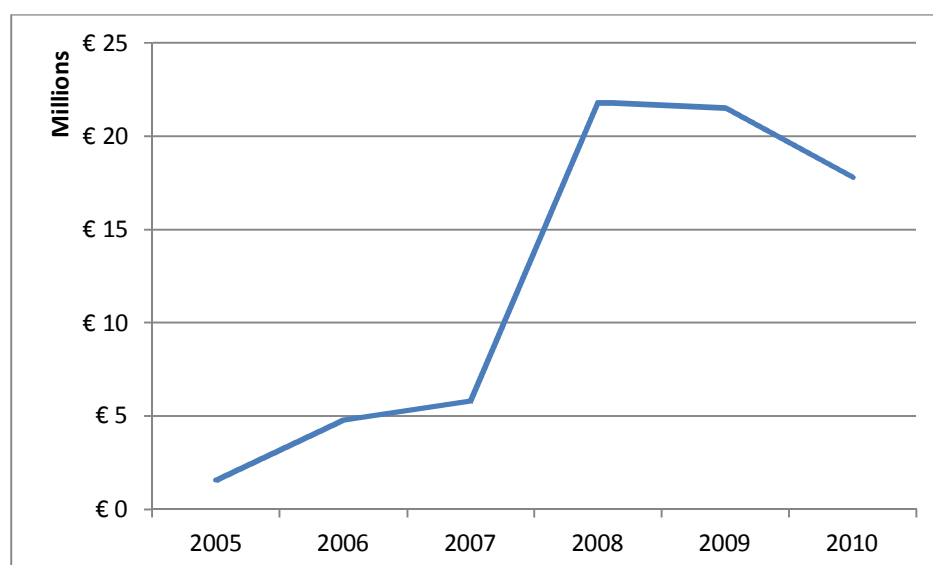


Figure 4: Overview of the development of the PSD expenditure for the period 2005-2010 (decentral programs)

Productive Safety Net Program (PSNP)

This extensive program is carried out by the World Bank, in particular by the IBRD. The Netherlands contributed to this program with 44,2 million euro (phase II and III) and this makes it the biggest decentral program for the Embassy. However, the total project costs were 1 billion dollar and this makes The Netherlands a relatively small donor in the total program. For this reason, The Netherlands was not actively involved in the steering of the program. USAid and IDA were the main other donors. The objective of the program is 'improved effectiveness of the Productive Safety net program and related household asset building program for chronically food insecure'. The PSNP aims to contribute to sustainable graduation from food insecurity for a large number of the chronically food insecure. The program helps households smooth their consumption and build productive community assets through public works. The program is one of the pillars of the Food Security Program of the Ethiopian government. Out of the broader PSNP, The Netherlands contributed to the Safety Net Grants, institutional support, drought risk financing and household asset building.⁴⁸ One could question to what extent this program is private sector development, because the focus is mainly on households and their food security. There is hardly any

⁴⁸ Bemo 20775 (2009); implementation completion and results report (2010).

relation with incorporating private industry or competitive markets to promote economic development or pro poor growth (as in the definition of PSD of the policy review).

There is an extensive impact evaluation available of this program.⁴⁹ Based on longitudinal household and community data, the study reports that the program has a modestly positive impact, but food security improved less than expected. The study reports on the period from 2006-2008. The Netherlands became involved in the PSNP in 2008 and for that reason this evaluation can't be used in the current study.

In 2010, the World Bank published a results report on this project. This extensive report shows how various indicators on food security and public works developed over the years. More and more beneficiaries were reached and communities were organized better. The World Bank rates the overall outcome as satisfactory.⁵⁰

Kafa development program

The Kafa development program was supported by the Netherlands with 8,8 million euro in the period between 2004 and 2011. The project was carried out by the Zonal Planning office of Kafa, in particular the Sheka Zone (in the west of Ethiopia). Core parts of the program relate to capacity development, market development and environmental protection.⁵¹ The program aimed at integrating the various spare heads of the Embassy in one region to explore to what extent these elements (e.g. education, health and food security) could be integrated.

At the moment of this preliminary study, hardly any information about this project is available. Some yearly reports of the Embassy report on the project and state that the project or parts of the project are in implementation. In a track record document of 2009 it becomes clear that the project is ending.⁵² More information is available at the Embassy.

SNV Support to Business Organizations and Access to Markets (BOAM)

This program, carried out by the Dutch organization SNV under the authority of the embassy, focused on market access and development of small enterprises. The Embassy provided SNV with 8.3 million euro between 2005 and 2011 for this project.⁵³ The Embassy of Ireland participated as well in the project, with a contribution of 400.000 euro, whereas SNV contributed 750.000 euro. The project started in September 2005 in two regions (Oromia and SNNPRS). The original project goal is to contribute to sustained reduction in rural poverty and the programmes objectives are to 1) significantly contribute to more efficient and effective agricultural value chains (by supporting public and private sector actors) and 2) improve the efficiency and effectiveness of farmers' organizations in agricultural marketing. (...) After midterm review, the overarching goal of the BOAM program is redefined: To introduce innovative approaches that aim to improve business to business relations in selected value chains, and scale up where possible.⁵⁴ The Midterm review concluded that the program was successful in creating opportunities, but that it was also necessary to turn these opportunities into results.⁵⁵ Another midterm review of this program for the period 2005-2010 and the final evaluation of the program are available at

⁴⁹ Gilliagan et al (2009)

⁵⁰ World Bank 2010, p. 15

⁵¹ Activiteitenoverzicht Piramide 2115

⁵² Yearly reports and track records Embassy

⁵³ Activiteitenoverzicht Piramide 12409 – SNV also conducted activities independently from Embassy funding.

⁵⁴ Maayers 2008, p. 8.

⁵⁵ Aleme, Maayers and Piosthumus (2008), Krabben, Aleme and Borch (2011), see protocol on assessment of evaluations at the online collaboration platform via www.minbuza.nl/iob/psd

IOB. The quality of these studies needs to be assessed before the conclusions of the study can be used.

BOAM focused on six value chains, of which the honey value chain was evaluated in IOB's evaluation of capacity building as one of the case studies of the work of SNV. This report focused on capacity development and was written under the responsibility of SNV. The report gives an overview of this particular part of the program, which can be helpful in assessing the effects on PSD.⁵⁶ Ethiopia and the value chain program of SNV are also part of the evaluation of the work of SNV, carried out in 2012 by IOB. For this reason, the advice is to give hardly any attention to this program in the elaborate study on PSD. More information about the BOAM program can also be found on www.sustainable-ethiopia.com.

Unicef Acceleration of water supply, sanitation and hygiene

In 2006, a project on water supply, sanitation and hygiene (WASH) by Unicef shifted between two parts of the budget of the Ministry. Originally, DMW, the department for environment and water policies, was responsible for this project. Because a large part of the project was executed in Ethiopia, it seemed more logic that the Embassy became responsible for this program. For this reason it became one of the de-central programs booked as part of operational objective 4.3 and part of the current preliminary study.⁵⁷ In some documents, the project is labeled as WASH, whereas others name it the Netherlands-Unicef Water Initiative (NUWI). The Embassy spend 7.78 million euro on this projects from 2007 to 2009. The goal of the program is 'contribute to the health of the population in eight woredas in Amhara, Oromia, Tigray and SNNPR through WASH service provision and the development of technical and management capacities of communities and local government. Activities range from rural water supply (...) to promotion of sanitation and hygiene, capacity building and knowledge management at regional, wereda and community level. 418,000 people have access to safe water and sanitation.'⁵⁸

A midterm review concluded that 'the EU-UNICEF supported WASH project is largely on track to deliver the stated outputs in terms of physical inputs and deliverables. This is a considerable achievement considering the number of obstacles which must be overcome on an almost daily basis.'⁵⁹ One of the outputs of the projects is engagement of the private sector through construction of latrines, hand-dug wells and drilling. One could question to what extent this project can be labeled as private sector *development*. This question was taken into account during the formulation of the second phase of this program. In this phase, involvement of the private sector gets more attention and this can be framed as a *lesson learned* based on the previous phase. More information about this project and the second phase is available at the Embassy.

Programs for Public Private Partnerships

As stated before, during his visit to Ethiopia former Minister Koenders signed a Memorandum of Understanding for Public Private Partnerships (PPPs) in Ethiopia. From 2007 to 2012, 6,3 million euro was committed for these projects. The MASP of 2008-2011 states that at least three PPP's must have been established on horticulture, oilseeds and on the seed sector. The MASP contains the following explanation: "The first two are good export income earners and currently are important drivers of economic reforms. This is an extension of our past efforts to strengthen value chains and improved market integration. We will further expand on the successes in the horticultural sector and the format of public

⁵⁶ Context (2010), Debela (2010)

⁵⁷ Bemo 17041 (2006)

⁵⁸ idem

⁵⁹ Unicef (2010), p. 6

private partnerships.”⁶⁰ In 2007, one PPP on horticulture was already established, which was prolonged in 2011. This horticulture partnership was part of the framework of the World Summit on Sustainable development (WSSD). This project is reviewed by the Expert Center in 2009.⁶¹ The other two partnerships were executed under an umbrella program and 4 million euro was available. An evaluation or other type of assessment of this umbrella program is not available, because the program is running until the end of 2012.

⁶⁰ MASP 2008-2011, p. 11

⁶¹ This review is available at IOB. Quality of the review needs to be assessed before the conclusions of the review can be used here.

4. The involvement of 'The Hague': coordination and expertise

4.1. DAF

The ministry of Foreign Affairs consists of several different regional departments and the Sub-Saharan Africa Department (DAF) is one of them. DAF consists of two different divisions:

- The Eastern and Western Africa and the Horn of Africa Division (DAF/HW), of which Ethiopia is part.
- The Central and Southern Africa Division (DAF/MZ)

The goal of DAF is to develop a coherent, effective policy to stimulate peace, stability and welfare by monitoring and coordinating the bilateral relationship between the respective country and the Netherlands. DAF cooperates with DDE and the Embassy to implement this goal in Ethiopia.

4.2. DDE

The Sustainable Economic Development Department (DDE) is a policy theme department of the Ministry of Foreign Affairs. DDE comprises 3 different divisions⁶²:

- International Markets Division (DDE/IM)
- National Policy Environment Division (DDE/NB)
- Entrepreneurship and Business Development Division (DDE/OB)

One of the goals of DDE is to stimulate growth and development of the private sector and through that to improve income and employment opportunities in developing countries. DDE tries to achieve the development of the private sector by identifying and tackling the problems in the business climate in Ethiopia. Other activities include the developing of the Ethiopian financial sector, improving trade opportunities and using trade and investment instruments to stimulate business. The latter is outsourced to organizations such as for example the Agency for International Business and Cooperation (AgentschapNL).⁶³

The main role of DDE was, according to the policy officer of DDE responsible for Ethiopia, was to link policies of the Embassy in Ethiopia and the Ministry in The Hague. This means thinking with and support of the Embassy when new possibilities arise and improving the current program, as well as presenting ideas and promote PSD in Ethiopia within the Ministry. The current policy officer works already more than 10 years in his position at DDE and is expert on PSD and agriculture in Ethiopia.

⁶² This division changed over the years.

⁶³Rijksporaal BZ, 'Organisatiestructuur' (version 07-11-2011), http://portal.rp.rijkswb.nl/irj/portal/http://portal.rp.rijkswb.nl/irj/portal/?NavigationTarget=HLPFS://cisrijksporaal/cisorganisatie/cisbz_2/cisdirectoraatgeneraalinternationalesamenwerkingdgis/cisdirectieduurzameeconomischeontwikkelingdde/cisclusters (10-01-2012).

5. Overview of the Central Programs

Under supervision of DDE, several central programs were active in Ethiopia. One of the characteristics of these programs is their demand driven approach: they become active when a clear demand from a government or enterprise in a developing country arises. For this reason, in most cases no specific country strategy is available. In this paragraph three active programs in Ethiopia are described: CBI, PSOM/PSI and PUM. There were also some PESP-studies conducted in Ethiopia. A complete overview of these feasibility studies can be requested at AgentschapNL. Other programs or facilities such as ORET/ORIO and FMO are open for applications from Ethiopia, but weren't active in this country during the period under investigation. For FMO, this relates mainly to the restrictive regulation of the financial sector by the Ethiopian government.

5.1. CBI

CBI is the 'Centre for the Promotion of Imports from developing countries - an Agency of the Netherlands Ministry of Foreign Affairs. Established in 1971 in order to support producers / exporters to get a foothold in the Netherlands market, support to Business Support Organizations in improving their capabilities and to act as a matchmaker between suppliers and buyers.' The mission of CBI is to 'contribute to sustainable economic development in developing countries through the expansion of exports from these countries.' CBI works with 5 main services: Export coaching programs, Business Support Organization Development Programmes (BSOD), training programmes on exporting to the EU, market intelligence information and a company database of companies coached by CBI. CBI uses a programmatic approach to integrate the different services.⁶⁴

The nature of the services of CBI creates an impossibility to disaggregate exact data at country level. However, for the Export Coaching program, the BSOD and the training programme some data are available for Ethiopia. For BSOD and training 930.730 euro was spend and during the training program 190 persons were trained. For the BSOD, 314.000 euro was spend on programmes in organic food production, tourism, fresh fruit and vegetables and home textiles. For tourism and parts of the integrated program in Ethiopia evaluation reports are available at IOB.⁶⁵

5.2. PSOM/PSI

The Programme for Cooperation with Emerging Markets (PSOM) started in 1998, and was converted in 2008 to the Private Sector Investment Program (PSI). The aim of these programs is to contribute to poverty reduction by stimulating sustainable investments in innovative business in developing countries. This is done by encouraging Dutch and foreign entrepreneurs to start investment projects in a joint venture company with a local entrepreneur. The program provides subsidies of 50-60% of the project costs of investments with high risks which would otherwise not be carried out. PSOM/PSI was carried out by the EVD, which is nowadays part of AgentschapNL.

In the period under investigation, 39 PSOM/PSI projects in Ethiopia were approved and 35 implemented. In total, 19,3 million euro was committed. 4 projects were stopped by the EVD or the Dutch partner because of problems in the period before investing (no subsidy

⁶⁴ Website CBI – www.cbi.nl

⁶⁵ The quality of some reports is assessed as insufficient by Ecorys (2010); the quality of some other reports needs to be assessed before using the reports in this study.

payment done). The majority of the projects could not be completed in time, because of problems with land titles or electricity connections, the late approval of the environmental assessment by the local government, problems with import of material for construction, problems with getting credit or problems with costs caused by an increase in the price of construction materials. PSOM/PSI works together with the Embassy to come to a solution for these problems. A complete overview of the projects can be found in Annex 2. Project descriptions are available in the yearly project overviews published by PSI/PSOM. PSOM/PSI works together with SNV, ICCO, Cordaid and Triodosbank in Ethiopia, mostly in relation to project information or financing. PSOM/PSI and PUM cooperate in two PSOM/PSI projects.

In 2010, Triodos Facet conducted an evaluation to examine whether PSOM/PSI projects carried out in 1999-2009 have delivered the expected results. The overall conclusion is that the PSOM/PSI projects were quite efficient and effectiveness and relevance was good. In a desk study, Triodos Facet researched 60 completed projects and in addition, 32 projects were visited. This was done in six countries, of which Ethiopia was one.

As a first step, Triodos Facet reviewed the portfolio of PSOM/PSI in Ethiopia. 47 projects were part of this portfolio, of which most were in the agriculture sector (75%). This fits with the priorities of the Ethiopian government, as described in the PASDEP. Most completed projects were in floriculture and horticulture, whereas in the ongoing projects more diversification can be seen.⁶⁶ The same development can be seen in the project overview of 2005-2011 (annex 2).

The evaluators of Triodos Facet studied 9 Ethiopian projects in the desk study and visited 6 projects for in depth evaluation. These projects were approved before 2005 and mainly in horticulture. All the 6 visited projects were 'profitable business with important employment effects which lead to enhanced income for the employees'.⁶⁷ Effectiveness and relevance are positive. The evaluators conclude that PSOM/PSI projects 'have been crucial in the dialogue that the Dutch Embassy has with the Ethiopian government', because the projects created opportunities to discuss bottlenecks in the business climate with the government.⁶⁸

More information about the projects visited and the methods used to assess the projects can be found in the evaluation, which is available at the IOB website. In addition, the Embassy and AgentschapNL plan to study the effects of PSOM projects in Ethiopia. A first report of this study could be available in the summer of 2012.

5.3. PUM

'PUM Netherlands senior experts is a non-profit organization, which has been advising needy businesses in developing countries and emerging markets for over thirty years. To this end, PUM links these businesses, at their own request, to Dutch professionals who voluntarily devote their considerable experience to creating a better world. PUM therefore promotes entrepreneurship, self-sufficiency and the sustainable development of small and medium-sized enterprise locally.'⁶⁹ This quote presents PUM in a nutshell. One of the main financiers of PUM is the Ministry of Foreign Affairs. In the period from 2005-2010 PUM carried out 67 projects in Ethiopia. A project list can be found in annex 3. Most projects were executed in the tourism sector, as can be seen in the summary of projects in figure 4.

⁶⁶ Triodos Facet 2010: 2

⁶⁷ idem: 6

⁶⁸ idem, p. 1

⁶⁹ Website PUM

Besides these projects, Ethiopia is also open for Vehicle applications. Vehicle is a special PUM program for vocational education, with a focus on the educational needs of SMEs. With better education, more graduates will be able to fulfill the needs of local businesses.⁷⁰ In Ethiopia, PUM has currently three local representatives, this number grew from 1 in 2008 and before to 3 in 2011. PUM cooperated with Agri-profocus and CBI in the period from 2008-2011.

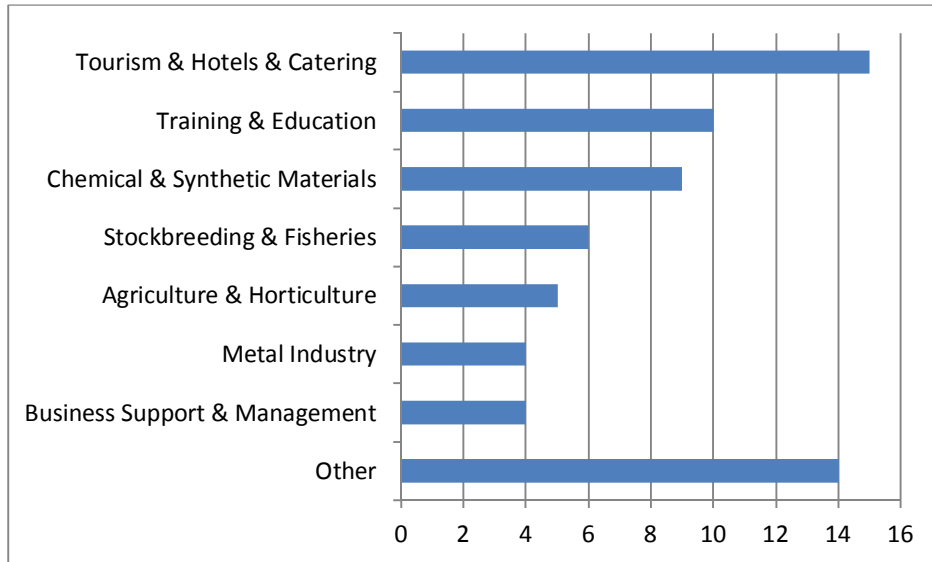


Figure 2: Overview of sectors PUM projects 2005-2010

⁷⁰ PUM website

6. Indication of NGOs and other organizations active in Ethiopia

Many other organizations are active in Ethiopia and various organizations are supported by the Dutch Ministry of Foreign Affairs. In this paragraph an indication of the work by NGOs supported by the Dutch Ministry of Foreign Affairs is presented. Working as an NGO is not an easy job in Ethiopia, as the Ethiopian government strongly regulates NGOs since 2009. While many NGOs had long argued for a new and coherent framework, the new law restricts areas of operations for different types of NGOs (for example by excluding those receiving more than 10 percent of funding from external sources from many areas of activity).⁷¹

In 2010, 28 Dutch NGOs spend around 27,3 million euro in Ethiopia. The majority of Dutch NGOs and most funds focused on the area of humanitarian aid and education. Around 10% (e.g. 2,8 million euro) of the budget relates to private sector development.⁷² Construction of these figures is done with the help of the network of Agri-ProFocus and the NGO-database and is an indication of the large amount of activities of various NGO's active in the field of PSD in Ethiopia.

Most active NGOs in Ethiopia for private sector development were:

- Agri-ProFocus partnership that organized the Ethiopia Learning Alliance and the Agri-Hub Ethiopia platform (evaluation available in the evaluation on Capacity Development)
- Agriterra, cooperative unions in several value chains (evaluation available)
- Cordaid, working on microfinance and value chains (evaluation available)
- Dorcas (employment and income, contribution of the Ministry of Foreign Affairs unknown)
- ICCO, working on Farmer Marketing Organizations and value chains (evaluation available)
- Oxfam Novib (food security and microfinance)
- Terrafina MicroFinance which is a joint programme of ICCO, Rabobank Foundation and Oikocredit) (evaluation available in the Partos Evaluation on Microfinance)
- SNV (BOAM programme on dairy, honey, fruits, oilseeds, see paragraph 3.3)
- Woord & Daad (SME development)

ICCO, Terrafina, Dorcas and SNV account for the largest part of the budget, although the amount of money from SNV is mainly determined by the previous described Boam program (paragraph 3.3).

Specific information about these organizations can be found at their websites. As mentioned in this list, IOB has some evaluations of PSD programs of these organizations. Before using these evaluations, the quality of the research needs to be assessed. For SNV, a country study is included in IOB's evaluation of SNV which will be carried out in 2012.

The program of NGOs in Ethiopia is supported by the work of knowledge institutes, such as Wageningen University and KIT. Within Agri-ProFocus, Agriterra, Cordaid, ICCO, KIT and

⁷¹ World Bank Country in brief

⁷² IS academie NGO database, www.ngo-database.nl, CIDIN & Ministerie van Buitenlandse Zaken – selection: 'business and other services', 'construction', 'industry', 'trade policy and regulation', 'transport' (addition of agriculture raises this number with 3.2 million euro, mainly for SNV and Cordaid). Information is combined with the information provided by the Agri-ProFocus network.

SNV pooled resources are organized in the Learning Alliance on value chains and farmer entrepreneurship, of which documentation is available at IOB. NGOs cooperate also with various companies in Ethiopia. Multilateral organizations are also active in Ethiopia and sometimes supported by the Dutch Ministry of Foreign Affairs. The exact mapping of these relations could be part of the elaborate study, but is for practical reasons not possible in the preliminary study. However, a first list with contact details of some of these organizations is attached in Annex 4.

7. Observations and recommendations

In this chapter, some first observations and recommendations for the elaborate study on Dutch PSD policies, activities and effects in Ethiopia can be found. As stated in the introduction of this report, three questions will be answered in the elaborate study:

1. *To what extent was the Dutch PSD policy aligned with (1) the national policy of Ethiopia and (2) internally coherent?*
2. *To what extent has the Dutch PSD program in Ethiopia been driven by the demand from actors in Ethiopia?*
3. *What (possible) effects of the Dutch PSD program can be established at enterprise level and if possible, beyond this level?*

For each question several points of attention can be distracted from this study. These points of attentions need to be taken into account by the researchers who will study Ethiopia.

1. *On alignment with the national policy of Ethiopia and internal coherence:*
 - It would be interesting to visit the Donor Assistance Group (DAG) and its PSD&Trade Working group to get an impression of the work of the Netherlands in this group. What picture do other policy makers in this field have of the Dutch program and its internal coherence?
 - The Dutch Embassy has the impression that the DAG is helpful in the dialogue with the Ethiopia government and that this dialogue enhances the success of the current projects. It would be interesting to check whether this impression is correct.
 - The Dutch embassy in Ethiopia stated that they searched for entry points in the business environment and conducted various programs on various levels (on the one hand on business support, on the other hand on the business environment or governmental level). The partially government-led economy needs to be taken into account when assessing the alignment and internal coherence, because entry point are sometimes hard to find. One could also question to what extent alignment with national policies is advisable in the Ethiopian context.
2. *On demand drivenness by actors in Ethiopia*
 - The PSOM/PSI evaluation by Triodos Facet (2010) gives some first hints about the demand drivenness of the PSOM/PSI program. This evaluation could be used as a first building block for answering this question.
 - The Embassy tries to balance large and small projects. To what extent is demand drivenness central in this process?
3. *On (possible) effects on enterprise level*
 - The PRSPs contain data on various economic indicators. The various ministries seem to have large statistical databases and various surveys among business are conducted yearly. These data could be useful for analyzing effects on enterprise level.
 - One of the points of attention of the Embassy was to enhance synergy between the various programs. To what extent was this successful in reaching results and/or effects?

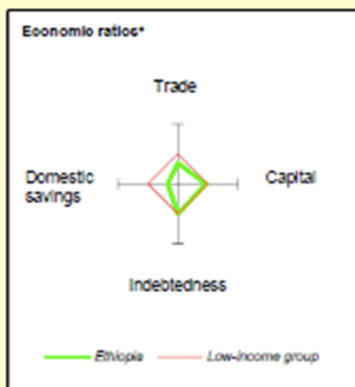
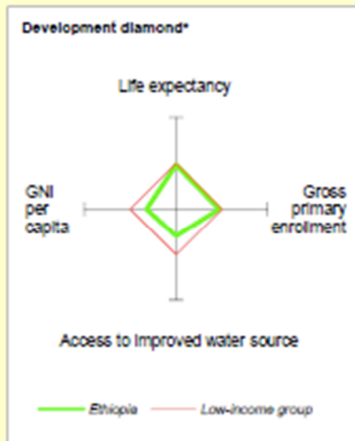
Annex 1: Ethiopia at a glance (World Bank)

Ethiopia at a glance

2/25/11

POVERTY and SOCIAL	Ethiopia	Sub-Saharan Africa	Low-Income		
2009					
Population, mid-year (millions)	82.8	840	846		
GNI per capita (Atlas method, US\$)	330	1,126	512		
GNI (Atlas method, US\$ billions)	27.1	946	433		
Average annual growth, 2003-09					
Population (%)	2.6	2.5	2.2		
Labor force (%)	3.3	2.9	2.6		
Most recent estimate (latest year available, 2003-09)					
Poverty (% of population below national poverty line)		
Urban population (% of total population)	17	37	29		
Life expectancy at birth (years)	55	52	57		
Infant mortality (per 1,000 live births)	67	81	76		
Child malnutrition (% of children under 5)	35	25	28		
Access to an improved water source (% of population)	38	60	64		
Literacy (% of population age 15+)	36	62	66		
Gross primary enrolment (% of school-age population)	98	100	104		
Male	103	105	107		
Female	92	95	100		
KEY ECONOMIC RATIOS and LONG-TERM TRENDS					
	1989	1999	2008	2009	
GDP (US\$ billions)	11.4	7.8	25.9	28.5	
Gross capital formation/GDP	13.5	21.9	19.8	22.4	
Exports of goods and services/GDP	6.6	11.7	11.4	10.6	
Gross domestic savings/GDP	9.6	9.6	0.4	4.1	
Gross national savings/GDP	11.0	15.3	14.8	18.0	
Current account balance/GDP	-2.6	-5.3	-5.8	1.2	
Interest payments/GDP	0.7	0.7	0.2	0.1	
Total debt/GDP	69.0	71.0	11.1	17.6	
Total debt service/exports	39.8	15.9	3.6	2.9	
Present value of debt/GDP	10.3	
Present value of debt/exports	82.4	
	1989-99	1999-09	2008	2009	2009-13
(average annual growth)					
GDP	3.2	8.1	10.8	8.7	6.5
GDP per capita	0.0	5.3	7.9	5.9	..
Exports of goods and services	3.8	11.1	-3.3	6.9	18.1

STRUCTURE of the ECONOMY	1989	1999	2008	2009
(% of GDP)				
Agriculture	53.5	49.5	43.8	50.7
Industry	12.4	12.9	13.0	10.7
Manufacturing	5.1	5.5	4.8	4.0
Services	34.1	37.6	43.2	38.6
Household final consumption expenditure	77.1	74.8	89.9	87.7
General gov't final consumption expenditure	13.3	15.6	9.7	8.2
Imports of goods and services	10.5	24.0	30.8	28.8
	1989-99	1999-09	2008	2009
(average annual growth)				
Agriculture	2.9	6.5	7.5	6.4
Industry	2.1	8.9	10.4	8.9
Manufacturing	1.0	6.8	7.1	12.3
Services	3.7	9.8	15.3	14.3
Household final consumption expenditure	3.3	10.6	18.1	7.8
General gov't final consumption expenditure	3.4	1.1	7.7	-10.7
Gross capital formation	3.8	10.2	-1.6	35.2
Imports of goods and services	4.3	14.8	12.6	16.4



Note: 2009 data are preliminary estimates.

This table was produced from the Development Economics LDB database.

* The diamonds show four key indicators in the country (in bold) compared with its income-group average. If data are missing, the diamond will be incomplete.

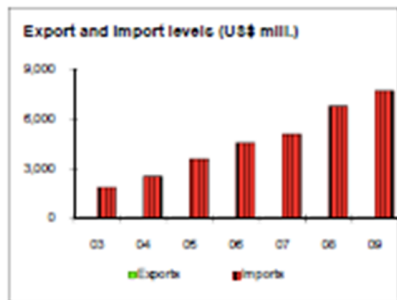
PRICES and GOVERNMENT FINANCE

	1989	1999	2008	2009
Domestic prices				
(% change)				
Consumer prices	9.6	4.8	25.3	8.5
Implicit GDP deflator	5.6	0.7	30.5	24.4
Government finance				
(% of GDP, includes current grants)				
Current revenue	18.9	17.3	14.3	0.1
Current budget balance	2.4	-0.7	5.2	0.0
Overall surplus/deficit	-5.9	-6.3	0.0	0.0



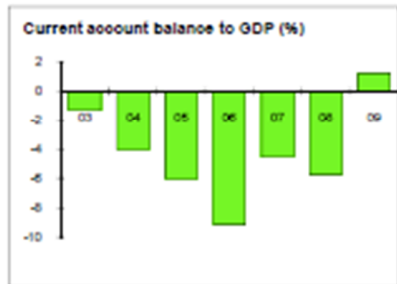
TRADE

	1989	1999	2008	2009
(US\$ millions)				
Total exports (fob)	444	484	81	83
Coffee	303	281	525	376
Pulses and oil seeds	13	50	362	447
Manufactures	74	37	123	118
Total imports (cif)	1,020	1,465	6,811	7,727
Food	158	100	362	830
Fuel and energy	103	111	1,621	1,257
Capital goods	405	586	2,139	2,592
Export price index (2000=100)	123	120	145	145
Import price index (2000=100)	99	79	154	143
Terms of trade (2000=100)	124	151	94	101



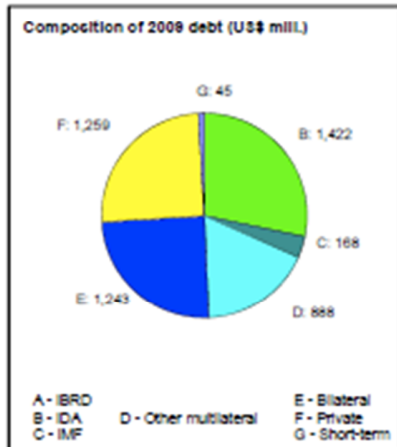
BALANCE of PAYMENTS

	1989	1999	2008	2009
(US\$ millions)				
Exports of goods and services	752	914	3,060	1,330
Imports of goods and services	1,201	1,780	8,282	118
Resource balance	-449	-866	-5,223	..
Net income	-83	-52	33	46
Net current transfers	238	502	3,699	..
Current account balance	-294	-417	-1,491	354
Financing items (net)	284	426	1,071	..
Changes in net reserves	10	-9	420	..
Memo:				
Reserves including gold (US\$ millions)	123	434	1,239	1,599
Conversion rate (DEC, local/US\$)	2.1	7.5	9.6	11.8



EXTERNAL DEBT and RESOURCE FLOWS

	1989	1999	2008	2009
(US\$ millions)				
Total debt outstanding and disbursed	7,855	5,557	2,879	5,025
IBRD	31	0	0	0
IDA	718	1,739	859	1,422
Total debt service	304	156	111	103
IBRD	13	0	0	0
IDA	9	32	10	12
Composition of net resource flows				
Official grants	383	357	2,885	2,723
Official creditors	401	154	340	1,062
Private creditors	-69	-12	-33	1,019
Foreign direct investment (net inflows)	..	70	109	94
Portfolio equity (net inflows)	0	0	0	0
World Bank program				
Commitments	72	0	432	670
Disbursements	70	157	160	553
Principal repayments	14	20	3	4
Net flows	56	137	157	549
Interest payments	8	12	7	8
Net transfers	48	125	150	541



Note: This table was produced from the Development Economics LDB database.

2/25/11

Annex 2: Overview of PSOM/PSI projects 2005-2011

First on going and successfully completed projects, further below failed/stopped projects (31/12/2011)

SECTOR: AGRICULTURE AND FOOD PROCESSING

	PSOM/PSI project number	Project title	Project description	PSOM grant (EUR)	Project status
	2005				
1	PSOM05ET02	Upgrading Organic Coffee Quality in Ethiopia	Upgrading Organic Coffee Quality by training and improved hardware	387,034	Completed successfully
2	PSOM05ET03	Florensis Ethiopia	Production of high quality rooted and unrooted cuttings of perennials and annuals on 1.5 ha	506,649	Completed successfully
	2006				
3	PSOM06ET02	Professional horticultural services	Horticultural services to commercial growers in Ethiopia, including soil and water analysis, soil and crop advice	486,937	Ongoing. Laboratory inaugurated in September 2011
4	PSOM06ET22	Introduction of a seed potato production system in Ethiopia	Introduction of a seed potato production system in Ethiopia	503,889	Completed successfully
	2007				
5	PSOM07ET01	Organic HACCP Operated Sesame Seeds Hulling Project in Ethiopia	Production and hulling of organic sesame seeds of 1500 farmers.	387,443	Completed successfully
6	PSOM07ET04	The set-up of Alema Koudijs Feed	Production of animal feed.	494,49	Completed successfully
7	PSOM07ET05	Freesia: growing & trading; bulbs & flowers	Production of Freesia bulbs & flowers	491,82	Completed successfully
8	PSOM07ET06	Establishing a lily cultivation site in Awassa, Ethiopia.	Production of lily flowers.	495,000	Completed successfully
9	PSOM07ET22	Mama's Fresh Injera	Industrial Injera Production in Ethiopia Addis Ababa	495,000	On hold, because of problems between partners

10	PSOM07ET25	` Dipasa Agro Ethiopia Ltd	Cleaning and roasting plant for 4 oil seeds (sesame, linseed, niger seed, safflower seed)	494,482	Ongoing
	2008				
11	PSOM08ET01	Producing young plants in the arboriculture sector	Young tree and bushes production in Ethiopia	494,921	Completed successfully
12	PSOM08ET04	Tissue Culture in Addis Ababa, Ethiopia	Start of tissue culture laboratory for export and local crops	495,000	Ongoing. Laboratory in use
	2009		- start of PSI		
13	PSI09ET01	Blueberry cultivation in Ethiopia	Production of blueberries for export on 20 hectares.	741,375	Had difficulties obtaining land, first trials now.
14	PSI09ET03	Developing the market for protein rich soy products in Ethiopia.	Production of tasty soy pieces and improvement of soy production of farmers.	625,750	Ongoing.
15	PSI09ET04	Breeding roses on the African continent.	Breeding roses in Ethiopia.	737,500	Ongoing
16	PSI09ET23	Pilot composting in Ethiopia: Soil fertility Ecology and Rural Development	Production of organic compost with the technology of Controlled Microbial Composting (CMC).	678,300	Ongoing
17	PSI09ET27	Farming for the future	Set up of a mixed farm that produces animal feed products and milk in Debre Zeit	749,970	Ongoing, problems in obtaining land for alfalfa. Maize production 60 ha already.
	2010				
18	PSI10ET01	Maranatha Poultry Farming	Commercial egg production farm with scavenging system and production of pullets.	573,220	Ongoing, problems with electricity access.
19	PSI10ET24	Establishing production and sea freight export of consumer ready potted plants and decorative fruits in Debre Zeit	production and sea freight export of consumer ready potted plants and decorative fruits	498,100	Ongoing, problems in obtaining land.
20	PSI10ET25	Hilina Food Testing Laboratory	commercial accredited food testing laboratory	699,886	Ongoing, construction costs much higher than expected.

		2011			
21	PSI11ET01	Sustainable high yield castor oil production in a desert area in Ethiopia	Sustainable high yield castor oil production in a desert area in Ethiopia	734,000	Already 100 ha planted
22	PSI11ET03	Growing and processing Raisin Tomato in Tigray, Ethiopia	Production of dried tomatoes	652,000	Problems with obtaining land
23	PSI11ET04	Establishment of a sustainable supply chain for industrial bamboo products	Sustainable bamboo production by cooperatives and production of compressed bamboo decking materials	750,000	Problems with obtaining land, but training coops already started
24	PSI11ET21	Tahini production facility with sesame outgrower scheme in Ethiopia	Organic and conventional Tahini production facility with sesame outgrower scheme for export purposes.	709,949	Recently started
25	PSI11ET23	Industrial baltena and injera sauce production in Ethiopia	Industrial baltena and injera sauce production for export to USA	439,200	Recently started
26	PSI11ET24	Quality linseed production with small-holder farmers in Ethiopia	Yearround production by outgrowers of linseed, seed potatoes and vegetables.	624,325	Recently started

SECTOR: OTHER

	PSOM/PSI project number	Project title	Project description	PSOM grant (EUR)	Project status
	2006				
1	PSOM06ET26	Cosmar East Africa	Decorative and skin care cosmetics manufacturing plant	503,990	Nearly completed
	2007				
2	PSOM07ET02	"Power to the People", bringing solar electricity to Rural Ethiopia.	Bringing solar electricity to Rural Ethiopia.	446,220	Successfully completed

3	PSOM07ET07	Establishing an eco-lodge at Lake Tana, Ethiopia	Establishing an ecolodge	495,000	Lodge at Nechisar park in stead of lake Tana, many delays because of park management
4	PSOM07ET24	Gorgora Nova Spa Resort & Water Lodges	Eco-tourism project: hotel, training centre, water lodges.	495,000	Construction started recently
2008					
5	PSOM08ET05	Professional Trade Exhibitions in Ethiopia, Addis Ababa	Start a company to organize trade exhibitions for all sectors.	307,120	Ongoing
6	PSOM08ET06	Developing the kitchen and bathroom sector in Ethiopia: a chain approach.	Production of kitchen and bathroom furniture, installation of complete kitchens and bathrooms, starting at the architect.	495,000	Changed local partner , started construction in April 2011
2009					
7	PSI09ET25	Ethiophia's first recycling and remanufacturing company of cartridges and toners	recycling and remanufacturing of cartridges and toners	749,770	Faced delays in formalising JV, now in construction phase
2010					
8	PSI10ET23	Pilot sustainable paint production factory in Ethiopia	Establish an ISO 9001 certified factory in Ethiopia to produce eco friendly paints	637,306	Delay because of illness local partner and developments in Egypt
2011					
9	PSI11ET05	Ethiopian Ballooning	Start of a ballooning company in Ethiopia	252,000	First flight in Feb 2012

Failed/stopped projects as per 31/12/2011:

	PSOM/PSI number	Project title	Project description	PSOM grant	Project status
				(EUR)	

1	PSOM06ET21	Duet enterprise plc ltd.	Summer flower production	0	Stopped by EVD because of problems between partners
2	PSOM06ET25	Glass Technology Centre.	Glass products	0	Stopped because of problems between partners.
3	PSOM07ET21	Establishment of artichoke cultivation and export chain.		0	Stopped because of problems between partners.
4	PSOM08ET03	Sustainable growth of Jatropha c.	Sustainable bio fuel production according to Cramer criteria	0	Stopped by EVD because of problems between partners

Annex 3: Overview of PUM projects

Year project start	CITY	CLUSTERDESCRIPTION	MAINSECTORDescription
2005	Addis Ababa	Healthcare	Healthcare Technical Medical Technology
2005	Addis Ababa	Food & Beverages Production	Bakery & Bread Factory
2005	Addis Ababa	Business Support & Management	Communications, Advertising & PR
2005	Addis Ababa	Chemical & Synthetic Materials	Pharmaceutical Products
2005	Addis Abeba	Business Support & Management	Communications, Advertising & PR
2005	Arba Minch	Transport & Logistics	Transport (Public)
2006	(blank)	Metal Industry	Metal Construction
2006	(blank)	Wood Trade & Processing	Furniture Manufacture
2006	Addis Ababa	Textile & Leather	Textile Industry
2006	Addis Ababa	Energy & Water & Environment	Energy
2006	Addis Ababa	Training & Education	Vocational education
2006	Addis Ababa	Chemical & Synthetic Materials	Polymers, Composites and MMF (man made fibres)
2006	Addis Ababa	Food & Beverages Production	Bakery & Bread Factory
2006	Addis Ababa	Chemical & Synthetic Materials	Inorganic materials and precious metals
2006	Addis Ababa	Agriculture & Horticulture	Horticulture - Flowers & Ornamental Plants
2006	Addis Ababa	Chemical & Synthetic Materials	Polymers, Composites and MMF (man made fibres)
2006	Addis Ababa	Metal Industry	Metal Construction
2006	Addis Ababa	Chemical & Synthetic Materials	Polymers, Composites and MMF (man made fibres)
2006	Addis Ababa	Stockbreeding & Fisheries	Cattle Breeding
2006	Addis Ababa	Stockbreeding & Fisheries	Dairy Processing & Products
2006	Debre Zeit	Stockbreeding & Fisheries	Cattle Breeding
2006	Ethiopia	Training & Education	Vocational education
2007	Arba Minch	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2007	Addis Ababa	Building & Construction Trade	Building Materials, Suppliers & Systems
2007	Addis Ababa	Business Support & Management	Communications, Advertising & PR
2007	Addis Ababa	Tourism & Hotels & Catering	Tourism
2007	Addis Ababa	Training & Education	Vocational education
2007	Addis Ababa	Chemical & Synthetic Materials	Polymers, Composites and MMF (man made fibres)
2007	Addis Ababa	Chemical & Synthetic Materials	Inorganic materials and precious metals
2008	Addis Abab	Training & Education	Vocational education
2008	Addis Ababa	Chemical & Synthetic Materials	Chemical Technology & Fine Chemicals
2008	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2008	Addis Ababa	Tourism & Hotels & Catering	Tourism
2008	Addis Ababa	Training & Education	Vocational education
2008	Addis Ababa	Training & Education	Vocational education
2008	Addis Abeba	Agriculture & Horticulture	Horticulture - Flowers & Ornamental Plants
2008	Gondar	Training & Education	Vocational education

2008	Zeway	Healthcare	Healthcare Management & Business Administration
2009	Awassa	Training & Education	Vocational education (Vehicle Latin America, Asia & Middle East-Central Asia)
2009	Debre Zeit	Tourism & Hotels & Catering	Catering, Restaurants and Events
2009	Addis Ababa	Tourism & Hotels & Catering	Catering, Restaurants and Events
2009	Addis Ababa	Wood Trade & Processing	Timber Processing
2009	Addis Ababa	Building & Construction Trade	Building Development, Architecture, Design & Engineering
2009	Addis Ababa	Business Support & Management	Financial Management
2009	Addis Ababa	Chemical & Synthetic Materials	Pharmaceutical Products
2009	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2009	Addis Ababa	Building & Construction Trade	Building Materials, Suppliers & Systems
2009	Addis Ababa	Agriculture & Horticulture	Horticulture Vegetables and Fruits
2009	Putten (Gelderland)	Agriculture & Horticulture	Arable Farming
2010	Dire Dawa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2010	Addis Ababa	Metal Industry	Metal Construction
2010	Addis Ababa	Trade	Whole Sale Trade (Business to Business)
2010	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2010	Addis Ababa	Stockbreeding & Fisheries	Beekeeping
2010	Addis Ababa	Training & Education	Vocational education
2010	Addis Ababa	Stockbreeding & Fisheries	Poultry Farming
2010	Addis Ababa	Training & Education	Vocational education (Vehicle Latin America, Asia & Middle East-Central Asia)
2010	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2010	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2010	Addis Ababa	Tourism & Hotels & Catering	Hotels Smaller Operations
2010	Addis Ababa	Metal Industry	Metal Construction
2010	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2010	Addis Ababa	Stockbreeding & Fisheries	Poultry Farming
2010	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2010	Addis Ababa	Tourism & Hotels & Catering	Hotels Large and Medium Size Operations
2010	Addis Ababa	Agriculture & Horticulture	Horticulture - Flowers & Ornamental Plants
2010	Addis Ababa	Wood Trade & Processing	Furniture Manufacture

Annex 4: List of contacts

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- John Belt (KIT)
- Gerrit Holtland (consultant SNV-BOAM, Cordaid and APF)
- David Kamukama (ICCO, or Andre Vording)
- Egbert Hoving (consultant, ex ICCO)
- Eva Smulders (ICCO F&S, 1e Agri-Hub coordinator until 2010)
- WUR: Wim Andriessen, Jan van der Lee, Marja Thijssen, Christy van Beek
- Cees van Rij en Mascha Middelbeek (Agriterra)
- John Lindhout (Woord en Daad)
- Karel Jaspers (Qlink) or Ody Maijers (both part of Nuffic Higher education)
- Joep van der Broek (EKN specialist PPP's)

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