

STATUS REPORT

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SEPTEMBER 2009
FINAL REPORT



STUDY COMMISSIONED BY BERSMP PROGRAMME AND CONDUCTED
BY MATCH MAKER ASSOCIATES LIMITED (MMA)



TABLE OF CONTENTS

1.0 INTRODUCTION	3
2.0 APPROACH AND DELIVERABLES OF THE ASSIGNMENT	4
2.1 PHASE 1: 16 TH OF JANUARY UNTIL 16 TH OF FEBRUARY	4
2.2 PHASE 2: 15 TH OF FEBRUARY UNTIL 16 TH OF MARCH	5
2.3 PHASE 3: 23 RD OF MARCH – 8 TH OF APRIL	7
2.4 PHASE 4: 27 TH OF APRIL – 16 TH OF MAY	8
2.5 PHASE 5: 18 TH OF MAY – 04 TH OF SEPTEMBER	8
3.0 DELIVERABLES VERSUS TERMS OF REFERENCE	9
ANNEX I: ITINERARY	11
ANNEX II: CONTACT LIST	15
ANNEX III: HONEY PRICES IN SUPERMARKETS	16
ANNEX IV: INTERVIEWS WITH KEY STAKEHOLDERS	17
ANNEX V: NAMES OF BERSMP AND BFE STAFF MEMBERS	25



1.0 Introduction

From the 16th of January Match Maker Associates (MMA), a Tanzanian based consultancy organization, was signed up for a four months business mentoring for Bale Eco-Region Sustainable Management Programme (BERSMP) in Ethiopia (Bale and West-Arsi region). BERSMP (Bale Eco-Region Sustainable Management Programme) is co-managed by two NGO's, namely FARM-Africa and SOS Sahel Ethiopia. The Bale Eco-Region Sustainable Management Programme (BERSMP) is working in Bale and West Arsi Zones of Oromiya Region, in partnership with the Bale and West Arsi Forest Enterprises. These actors aim to realize value addition through sustainable use of natural resource values in a thrust to drive sustainable economic development. Sample products include forest honey, forest coffee, trout fish, bamboo products, plant bio-pesticides and essential oils.

From the beginning the Programme worked with small business groups, in an effort to support and develop small and medium scale business. Current groups worked with include forest honey and forest coffee trading groups, private tree nursery groups, bamboo furniture groups, and improved fuel saving stove production groups. A short Business Planning and Management training has been carried out, before MMA was assigned, in order to build initial business skills and capacity of Programme and Partner Staff. The training highlighted the many challenges faced by the BERSMP in its aim to promote and develop viable and sustainable natural products businesses.

Based on these challenges MMA Associates was assigned to start building the business capacity of interest groups (producers), the regional (BERSMP) project staff and their governmental counterparts (of the Bale Forrest Enterprise), microfinance institutions (like Oromia credit and saving association) and other relevant extension agencies on the one hand. To build this capacity, business trainings, business viability reviews, workshops, fieldwork and mentoring sessions were conducted. All the above mentioned actors were in one or more of these activities involved. Later in the report the specific activities will be described.

To make the efforts of MMA more effective, the scope of activities for this four months assignment was reduced to four activity lines and the forest products honey, coffee, and bamboo and eco-tourism were selected. The selection was based on criteria chosen by the project and the progress and potential in the different product/service lines based on the BERSMP financed consultancy reports. Besides the main focus on building business capacity, MMA provided a broader overview of the four activity lines through sub sector analysis and also identified Value Chain (VC) options in all four of them. The Forest Enterprise, in close conjunction with the BERSMP staff, could start making business decisions based on the outcomes of the studies.



2.0 Approach and deliverables of the assignment

As stated this project was designed for four months, starting from the 16th of January and lasting until 16th of May. MMA appointed two consultants for the assignment of which the principal consultant was the team leader. The principle consultant was actively involved in the first few and last weeks of the assignment and functioned in between as backstopper of the consultant who was the main executor of the assignment. The four months were cut up in four phases of three weeks and the fourth week the consultant would travel back to the home office in Arusha, Tanzania, for discussion with the principle consultant. Moreover it allowed the consultant to use internet, phone and other means of communication necessary for this project.

The different phases are described in more detail below.

2.1 PHASE 1: 16th of January until 16th of February

The consultants used the first days to learn more about the project; meeting with key players (i.e. head of the Forest Enterprise, an ecological producer (Ecopia) and partners in the BERSMP project) and analyzing the BERSMP financed (consultancy) reports. These initial days took place in Addis Ababa, the capital of Ethiopia, and after that the consultants traveled to Bale Region in Southern Ethiopia. Another round of meetings with key players (i.e. the Bale Forest Enterprise project staff, BERSMP key staff members etc.), and several field visits were conducted in Bale. Parallel to these field activities, the consultants reviewed relevant secondary information. After this inventory stage, the earlier mentioned prioritization of the natural products took place and the planning for the coming four months was finalized.

The second part of this first phase was developing a broader overview of the different product/service lines by using Sub Sector analysis and at the same time building the capacity of the Bale Forest Enterprise (BFE) staff to enable them to do it themselves. The meaning and importance of Sub Sector analysis will be shortly explained here. A Sub Sector are all actors that buy and sell from each other in order to supply a particular set of products or services to final consumers. Furthermore a sub sector includes producers, processors, input suppliers, exporters, retailers, etc. It assists in understanding dynamics of the product lines; more specific it identifies the actors and their roles and relationships, identifies channels (product flows) and dynamics and gives a rough insight of the profitability of the actors.

A two-day training sub sector training was conducted for the purpose of building the capacity of the BERSMP and BFE staff. The training provided the participants with practical tools and methods to be able to conduct a similar analysis themselves. Evidently, there was already a lot of knowledge among the participants regarding the selected products/services and one of the challenges was to turn this knowledge into practice by making sub sector overviews (e.g. maps). It proved to be a good start for the actual fieldwork. As mentioned the four chosen product/service lines, selected for the assignment, were honey, coffee, bamboo and eco-tourism. As eco-tourism was almost not developed in the Woreda's (there were hardly any actors and dynamics to analyze) and also for time effectiveness the sub sector training and fieldwork was limited to honey, coffee and bamboo in Bale region.

Three teams of 3 to 4 members – all of them followed the training - were allocated to the three commodity groups. The consultant from MMA backstopped the teams and also led the bamboo group. Fortunately a local consultant, who was writing his master thesis on honey value chains in Bale region with support from BERSMP, was preparing to lead the honey group and he co-



assisted the coffee group, as many honey and coffee actors were located in the same area. The information gathering from the fieldwork in Bale, mainly by holding interviews with various actors in the sub sectors and key resource persons, focused on three main areas:

1. Identifying (mapping) the actors and the trade relationship.
2. Finding the trade volume between the different actors.
3. Acquire the gross margin (the direct costs minus the income).

The teams worked simultaneously for four days and though most of the important information was evidently gathered, some critical gaps remained. In the intermediate phase there was time allocated to address these gaps but as with any study that mainly depends on primary data, it is unavoidable that some 'black boxes' exist. In the other report by MMA, titled VC options, detailed results of the analysis can be found.

For BERSMP and especially the BFE (who is a market player), the sub sector analysis is a powerful tool to get a better insight in a (forest) commodity. This analysis will provide crucial information, which enables the BFE to decide how to develop the sub sectors and in case there is hardly any scope for development, they may even decide to drop a particular sub sector. Although quite some appreciated and valued the training as well as the analysis in the field, others unfortunately didn't. They missed the way it contributed to their work, which for some was indeed the case. Partly because the selection of the participants wasn't done critically enough, which resulted in participants following a training that wasn't meant for them. This observation is based on several formal and informal discussions with the participants. Moreover looking at it in hindsight the moment of the training, right at the beginning, might have been too early; especially as most participants had a general lack of business skills. Having said that the tool remains, an important tool for making business decisions, especially for senior staff.

2.2 PHASE 2: 15th of February until 16th of March

During the intermediate phase new (market) information was gathered and integrated in the sub sector analysis started in Phase 1. However, building the business capacity of the interest groups producers - and the extension workers supporting them - was the main purpose of this phase. A tailor made business mentoring/ training program was designed for this purpose. To be more effective the training/mentoring was held in the different Woreda. The first week was conducted in Dello-Mena (due to the relative short distance participants from Harrana Bulluk joined the participants from Dello Mena), the second in Goba and the last in Nensebo.

The design and goal of the program was three folded: first a two day TOT (training of trainers) to train extension workers from the different organization, i.e. from the Bale Forest Enterprise, BERSMP, cooperatives and micro finance institutions. This TOT was a two days training focused on FaaB (Farming as a Business), with the goal of building their business development capacity. Also, the TOT enabled them to train the interest groups on the ground. The major topics dealt with were: basic business skills and marketing concepts, risk management, records keeping, planning by using the Projected Income Statement - which enable participants to calculate a possible profit or lost, furthermore market linkages and monitoring and evaluations. The overall training approach was to create an environment where there was a two-way stream. This was done by having regular practical assignments, group discussions, energizers as well as showing appreciation for and using the inputs of the participants during the training.



The second step was to train the actual interest groups/producers for two consecutive days. The freshly trained trainers conducted this training with support from the MMA consultant/mentor. The program for the interest groups was similar to the TOT, although slightly simplified and in the local language. The deputy manager of BERSMP was appointed, with back stopping of the MMA consultant, as head trainer. A similar interactive approach with the participants (producers) was pursued and highly appreciated; this was concluded from the evaluations at the end of the training and informal comments during the training.

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On the last day - or two days in some cases - the trainers, with backstopping by the MMA consultant, were sitting with the actual producers group and working on their business plan. First a template was developed, based on the existing business plans, and during the three training cycles this template was further improved and developed. This phase started with a short TOT on BP writing and hereafter the TOT trainers could assist the interest groups with developing their own plan. A clear message was given to the trainers to act as advisers. So the producers group discussed and developed the business plan by themselves so to really let them own their business plan. Already several businesses plans are handed in and were granted financial support by BERSMP.

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During the evaluation, which was done by means of group discussion just after the last training session, several points were discussed with the extension workers and the MMA consultant. The most important comments were that there should be a follow-up after this training, especially after the departure of MMA. It was recommended that a business manual be developed for future reference by interest groups/producers and extension workers. Furthermore, the training was a starting point and producers/interest groups need continues and (follow-up) support from extension workers in business and practical matters. Also, it has to be realized that some of these business will not survive - groups falling apart or strong competition etc -, however, this should not de-motivate BERSMP. If only a few of these businesses will be successful – in every product group – it will have a spin-off effect towards others. A good example of that can be found in Delo-Mena. There is a successful honey producer and people all over the country and locally are visiting him. Not only do they learn from him but it also proves that a successful business is feasible.



What kind of opportunities can be grasped and what kind of weaknesses need to be dealt with, these questions are addressed in a separate document '*Gap analysis interest groups and producers*'.

2.3 Phase 3: 23rd of March – 8th of April

One of the tasks for MMAs was to explore market linkages opportunities for the different product/service lines. For this purpose meetings were held with the Oromia Coffee Cooperative, honey experts from SOS-Sahel and SNV, senior experts from the Ministry of Agriculture, a short visit to the commodity exchange, a tourism expert (working on eco-tourism for USAID), directors of two coffee exporters, two eco-tourism tour operators (Quadrant and travel Ethiopia), two big honey processors/exporters (Beza Mar and Apinec) and lastly with the chairman of association of honey processors and exports. In the annex 3, the main point of the discussion/meetings can be found. These meetings and visits were critical for the last phase of the assignment, which was the development of the VC options and business development propositions. Also, it provided good insights how BFE will fit in the proposed VCs.

In the remaining two weeks of the third phase, the focus was back on the interest groups/producers. Experience showed that as a result of MMA trainings, participants were very eager to practice the new taught methods, however the good intentions were dropped over time due to work pressure and other issues taking over. To avoid this as well as to further support the producer/interest groups, a mentoring session was planned for most of the trained groups. In the four Woredas three bamboo groups/furniture makers, two stoves groups, one Tej brewer, the Bale beauty nature club, three woman-trading groups, and two coffee entrepreneurs were mentored.

When visiting these different groups after a month of the training - especially in honey but to a lesser extent in bamboo and coffee - changes were visible. Several groups started calculating their future profit and loss, (which was based on the PIS thought during the training), others applied different marketing techniques, records were being kept and risk management strategies worked out. For example many coffee traders decided to buy unprocessed coffee, add value by drying and de-husking, storage it and than sell it at the right time; it was interesting to note that they were speculating on the fluctuating of market prices. Nonetheless, still some gaps had to be addressed and the most critical one are listed below:

- Insufficient collection of market information from key resource persons and from the media (radio, tv and newspapers).
- Little effort was made to learn from competition.
- Several groups didn't plan ahead, were not keeping records or made sure to get the business plan on paper (instead of keeping it in your own head).
- Many groups did not take in mind to start slowly as to build experience (to avoid losing large sums of money and betting on the wrong horse).
- Also, various groups found it challenging to calculate their (future) profit or loss as hence had difficulties to make informed and good business decision.



2.4 Phase 4: 27th of April – 16th of May

The last phase started right away with building the business skills (capacity) of the BFE; particularly at the head office in Goba. As hardly any personnel of the enterprise had a business background, it started on a basic level. A tailor made training was developed to fulfill their requirements though the training had similarities with the business training given in Phase 2. Actually, the extension workers of BFE (who were trained in phase two in the different Woredas) stated that the training was very applicable for the BFE staff at the head office. The consultant had the same impression and a need assessment with BFE staff further confirmed this.

After this training the different VC scenarios were worked out and presented in the final workshop (13th of May). For the purpose of developing the options, the consultants had several meetings with key actors (some were follow-up from earlier talks in phase three). These discussions were focused on the kind of possible partnership between BFE and private sectors actors. Meetings and visits were conducted with coffee producer 'AZ Coffee' (twice), the director of Eastern Eastern Africa Bamboo Project, a coffee export expert from Fintrac (a NGO), a follow-up interview was held with honey expert Mr. Solomon, a second visit with ecological producer Ecopia (on honey) and the owner of travel Ethiopia, initial discussions were held with director of Adoney Ethiopia, visits were to SNV (Netherlands Development Organisation) and two bamboo workshops in Addis Ababa, and further information was gained on the coffee commodity exchange. Hereafter, the information was analyzed, compiled and transformed into a PP presentation. During the final workshop the different scenarios – in each of the four product/service lines – were presented and discussed with senior BERSMP and BFE staff. The scenarios and options provided were appreciated and some of them were found interesting to explore further. Final choices can only be made after additional information about the cost/benefit is collected and analyzed.

2.5 Phase 5: 18th of May – 04th of September

The last phase was to finalize the reports for BERSMP. The following reports were prepared:

- Status Report
- Market Study and VC options
- Gap analysis
- Rapid business plan viability review tool
- Ten steps to a successful forest enterprise

In addition a cd-rom with relevant reference material was compiled.



3.0 Deliverables versus Terms of Reference

The key task and roles of the consultant were stated in the (original) Terms of Reference (TOR) as follows:

- Act as a mentor / trainer to the BERSMP and BFE / WAFE livelihoods and business development staff – carrying out all business development tasks with them in order to transfer business development and management skills and knowledge.
- Deliver Business training both through specific short courses, learning sessions and practical learning by doing
- Undertake a rapid review of the BERSMP / BFE / WAFE approaches to natural products business development support
- Review BERSMP Community Development Fund use and approach / recommend improvements / working with programme staff trial and test out improved systems, and set up a simple CDF monitoring system.
- Develop a method (tool) for the Rapid Viability Review of Community Business Plans (Business Viability Review). Working with Programme staff, experiment with the method on existing and new community business plans.
- Visit the various existing community level business groups currently funded by the BERSMP and undertake Business rapid viability reviews. Support Business plan improvement and updating.
- Design and support the implementation of a simple accounting system for Community level business groups. Working with BERSMP accountant and appropriate government staff.
- Design a simple account auditing system for the financial monitoring of loans given to Community level business groups. Working with BERSMP accountant and appropriate government staff.
- Review the availability of Business Development Services in the operational areas of the programme, Bale and West Arsi Zones. Review the role of existing Government and or private microfinance institutions, and how the programme and such institutions might work together to deliver Business services.
- Identify and develop national and international business contacts through appropriate business support networks.
- Submit a status report at the end of the assignment of *Sustainable Development and Sustainable Environments through Community level Natural Products Business Enterprise*, documenting activities undertaken, follow up strategies and plans, including an opportunities analysis.

At the end of the last mission the above deliverables were reviewed and it was concluded that:

- ❖ Most of the above has been effectively delivered either through training, coaching and/or tools.
- ❖ The review of the BERSMP Community Development Fund has not been undertaken. It was supposed to be part of Phase 1 but due to other pressing activities, i.e. selection of the products/service lines, it didn't receive due attention.
- ❖ Also a simple account auditing system for the financial monitoring of loans was not undertaken, however, in the technical proposal submitted by the consultant it was already proposed to subcontract this activity to someone else.
- ❖ Additional to the TOR, sub sector/value chain analysis were conducted by the consultant and a separate report with sub sector maps and dynamics as well as value chain development options has been prepared and submitted.



With respect to the process and next steps the following remarks and suggestions were made:

- The process of fieldwork of 3 weeks followed by a week of backstopping in Arusha worked out well though it could have been reduced by one trip.
- It is evident that the farmers' business groups are in an early stage of development and in the absence of a mechanism for ongoing mentoring and coaching the progress made could be easily halted.
- The in-house training of BFE staff was very useful but unfortunately, it did not result yet in a business plan for BFE.
- To follow-up the VC development options and market leads it is critical that the capacity regarding business development and marketing of both BFE and BERSMP is strengthened. Options in this respect are:
 - Seeking a structural collaboration with SNV, Netherlands Development Organization, in Ethiopia particularly for the purpose of VC development;
 - Approaching VSO for the posting of a business and marketing advisor with BFE;
 - For specific assignments such as a loan monitoring package Shared People and/or PUM (retired managers) could provide short term experts
- To enable BFE to develop a business plan MMA is offering to undertake an additional mission to Bale in August. This can be considered as 'after sales service' and hence the consultancy fee is not to be paid but only the ticket, accommodation and per diem. To guide this input a separate TOR will be developed and shared with the consultant.



ANNEX I: ITINERARY

Date	Task	Remarks
19-01-2009	<p>Introductory meeting with BERSMP in Addis Ababa</p> <p>Literature review</p> <p>Meetings with key players in Addis Ababa:</p> <ol style="list-style-type: none"> 1. Head of Oromia Forest Enterprise (Dr. Girma Amante) 2. Head of Frankfurt Zoological society (Thadaigh Baggallay) 3. Director of Ecopia (Dr. Mutslal Kifleyesus-Matschie) 4. Local coordinator (Kinfe Mamo) 5. Project director of Born Free (James Young) 6. SOS-Sahel (Feyera Abdi) 	Ben (BERSMP) & Marc and Henri (MMA)
23-01-2009	<p>Continues literature review</p> <ol style="list-style-type: none"> 1. Follow-up introductory meeting in Bale with key staff members of BERSMP (lulu, Hussein, Sahlemariam and Ben). 2. Head of Bale Forest Enterprise (Belay) 3. Field visit to different producer groups and meetings in Dello Mena Woreda (Girma Ayele, Andy, Siyum, Indiyu, Ben and Lulu). 	Marc and Henri (MMA) had meetings with the outlined actors
25-01-2009	Based on analyzed information, a detailed plan for coming months was designed (MMA) and discuss with BERSMP (Ben).	Marc and Henri (MMA)
28-01-2009	Two day Sub Sector Economics Training BERSMP and Partners training. All BERSMP field staff (incl. four Woreda development officers), senior BFE staff members, one participant from a local NGO and two participants from zonal cooperative office participated in this training.	Training was provided by Marc (MMA) and Sisay.
30-01-2009	<p>Interviews/ field work to conduct Sub Sector analysis for three commodities:</p> <ol style="list-style-type: none"> 1. Honey - Sisay was group leader and was supported by mainly supported by Girma (from zonal cooperative office). 2. Bamboo - Marc was group leader and was supported by Girma (Goba), Sahelle and Ayub) 	Marc (MMA) was the overall back stopper although supported by Sisay.



	<p>3. Coffee Lulu group leader and was supported by Haptamu.</p> <p>Travel back to Tanzania</p>	
09-02-2009	<p>Intermediate phase:</p> <ol style="list-style-type: none"> 1. Principle consultant backstops consultant (MMA) 2. Analyzing of information gathered during previous fieldtrips. 3. Preparing trainings for coming period. <p>Travel back to Ethiopia</p>	<p>Marc and Henri (MMA) Arusha.</p> <p>Marc (MMA)</p>
17-02-2009	<p>Follow up on Sub Sector study/ field work</p> <p>Preparations for coming trainings</p>	<p>Marc (MMA) and Lulu (BERSMP)</p>
23-02-2009	<p>Two-day TOT conducted in Dello Mena (leaded by Marc and supported by Lulu)</p> <p>Two-day Training of farmer groups (leaded by Lulu, Girma Ayele and Haptamu)</p> <p>Two day Business plan writing (Leaded by Marc, Girma Ayele, Haptamu, Lulu and with overall backstopping of Marc).</p>	<p>With Marc's backstopping (MMA)</p> <p>With Marc's backstopping (MMA)</p>
02-03-2009	<p>Two-day TOT conducted in Goba (leaded by Marc and supported by Lulu)</p> <p>Two-day Training of farmer groups (leaded by lulu and supported by Girma Ayalew and BFE counterpart Nadew)</p> <p>One day Business plan writing (Leaded by Marc, Girma Ayalew, Lulu, Nadew).</p>	<p>With Marc's backstopping (MMA)</p> <p>With Marc's backstopping (MMA)</p>
09-03-2009	<p>Two-day TOT conducted in Nensebo (leaded by Marc and supported by Lulu)</p> <p>Two-day Training of farmer groups (leaded by Lulu)</p> <p>Two day Business plan writing (Leaded by Marc, Lulu, Getachew, Ibrahim and BFE counterpart Endiyo).</p>	<p>With Marc's backstopping (MMA)</p> <p>With Marc's backstopping (MMA)</p>
17-03-2009	<p>Intermediate phase:</p> <ol style="list-style-type: none"> 1. Principle consultant backstops consultant (MMA) 2. Analyzing information gathered during previous trainings. 3. Preparing business mentoring and interviews. 	<p>Marc and Henri (MMA) Arusha.</p> <p>Marc (MMA)</p>



	Travel back to Ethiopia	
23-03-2009	Interviews held with: <ul style="list-style-type: none"> - Director of the Oromia Coffee Cooperative. (Dessalegn Jena) - SOS-Sahel (Feyera Abdi) - Honey expert from SNV (Agnes G. Luz and Shireraw Meskerem) - Senior experts from Ministry of Agriculture. - Tourism expert (Biniyen) - Coffee exporter (Getachew H. Micheal) - Coffee exporter (Abdula Baga) - Director Quadrant (Tony Hickey) - Director Travel Ethiopia (Kedir Kemal) - Beza Mar (Haile Giorgis Demissie) - Apinec (Woubset) - Chariman of association of honey processors and exports (Solomon Yirga). 	Interviews executed by Marc and Lulu.
31-03-2009	Business mentoring with producer groups in Goba: <ul style="list-style-type: none"> - Members of a woman group, producing stoves in rural area's of Goba Woreda. - Owners of stove producer in Goba town. - Owner of Bamboo enterprise - Managing director of Tej house - One of the founders of the Bale beauty nature club (Ayub). 	Executed by Marc, Lulu, Girma Ayalew, Nadew and BERSMP intern.
02-04-2009	Business mentoring with producer groups in Dello Mena: <ul style="list-style-type: none"> - Two different woman trading groups - Group meeting with three honey producer groups. 	Executed by Marc, Lulu, Ben, Girma Ayele and Mulugojjam.
03-04-2009	Business mentoring with producer groups in Harrena-Bulluk: <ul style="list-style-type: none"> - Bamboo group - Woman trading group (from Shawe) e.g. in coffee and honey - Woman honey trading group 	Executed by Marc, Lulu, Ben, and Haptamu.
06-04-2009	Business mentoring with producer groups in Nensebo: <ul style="list-style-type: none"> - Honey producer group (lowlands) - Three honey producers (highlands) - Coffee group (highlands) - Private coffee producer - Coffee cooperative 	Executed by Marc, Lulu, Getchaew and Endiyo.
	Travel back to Tanzania	
10-04-2009	Intermediate phase: <ol style="list-style-type: none"> 1. Principle consultant backstops consultant (MMA) 2. Analyzing information gathered during previous trainings. 	Marc and Henri (MMA) Arusha.



	3. Preparing business mentoring and interviews. Travel back to Ethiopia	Marc (MMA)
20-04-2009	<i>Activities of MMA-consultants outside BERSMP assignment</i>	
27-04-2009	<ul style="list-style-type: none"> - Preparations for two-days basic training. - Two-days basic business training of BFE - Data gathering for business opportunities for BFE (Bale) 	Training was held by Marc (MMA) and participated by most BFE staff - 12-13. Marc (MMA) and Paolos (BFE)
07-05-2009	<p>Interviews in Addis with:</p> <ul style="list-style-type: none"> - The Eastern African Bamboo project - Bamboo flooring maker 'Adal industrial - Director of Ecopia (Dr. Mutslal Kifleyesus-Matschie) - Director Travel Ethiopia (Kedir Kemal) - Director coffee producer AZ - Eco-tourism company Lintos - Eco-tourism company Adoney Ethiopia (Samuel) - Fintracs (NGO) - Two bamboo producers in Addis town. <p>Preparation final workshop</p>	Marc and Henri (MMA)
13-05-2009	Final workshop: attended by key BERSMP and BFE staff	Marc and Henri (MMA)
18-06-2009	First draft of reports	Marc and Henri (MMA)
29-07-2009	Feedback on reports	BERSMP
04-09-2009	Final reports	Marc and Henri (MMA)



ANNEX II: CONTACT LIST

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16	Dr. Rown	Project coordinator	US-aid	+251-912600409 (mob)
17	Abdula Baga	Coffee Exporter		+251-911201310 (mob)
18	Woubset	Managing Director	Apinec	+251-911407360 (mob)
19	Teklu Tesfaye	Program officer	Royal Norwegian embassy	+ 251-11-3710799, +251-911-228976 (mob), tete@mfa.no
20	Janny C. Poley MA	First secretary of Embassy	Embassy of the Kingdom of the Netherlands.	+251-11-4711100, jc.poley@minbuza.nl
21	Feyera Abdi	Executive director	Sos Sahel Ethiopia	+251-11-167583 / 160279, SOS.Sahel@ethionet.et



ANNEX III: HONEY PRICES SUPERMARKETS ADDIS ABABA

Small supermarket (Haile G/Selassie Avenue)						
Quantity	Origin	branding	Appearance of honey	Packaging		Price
T-Bee	Addis	Price fighter	Not liquid but quite thick honey (two colors white & brown)	Moderate	500 gram	22 birr
Yeshi Bee	Addis	Lower-medium segment	Clear honey	Good	800 gram	32 birr
Medium supermarket (Haile G/Selassie Avenue)						
T-Bee	Addis	Price fighter	Not liquid but quite thick honey (two colors white & brown)	Moderate	500 gram	22 birr
Capilano	Australia (export)	branded as high quality export	Very clear & clean	Very good	500 gram	67 birr
Tutu honey	Addis (Gesha region)	Although price fighter good appearance	Good & clear honey	Good	1 kg	34 birr
Big supermarket 'friendship' (Bole road)						
Tutu honey	Addis (Gesha region)	Although price fighter good appearance	Good & clear honey	Good	250 gr	14 birr
Tutu honey	Addis (Gesha region)	Although price fighter good appearance & forest and organic	Good & clear honey	Good	500 gr	20 birr
Welela Honey	Tigrai region	Badly packaged	Honey was not liquid	Not good	1.5 kg	148.5 birr
Welela Honey	Tigrai region	Badly packaged & honey was not liquid	Not clear	Not good	250 gr	29 birr
Alem honey	Ethiopia	Fine appearance	Fine	Fine	500 gr	20.50 b
Dimma	Tigra region	Forrest honey & attractive packaged	Good	Very good	500 gr	37.5 ETB
Dimma	Tigra region	Forrest honey & attractive packaged	Good	Very good	250 gr	23 ETB

(15-03-2009)



ANNEX IV: INTERVIEWS WITH KEY STAKEHOLDERS

Roughly three phases of interviews (meetings) were conducted. In the initial phase the MMA consultants had meetings (19th until 21st of January) with several key actors, as to guide them into the matters and tasks ahead. In the second part (23rd until 27th of March) interviews were held, to shed light on the different business options for the Bale Forest Enterprise (BFE) and the requirements of the different markets. These interviews are worked out underneath. The third and last round of interviews (07-05-2009) was to verify findings, i.e. findings from the second round of interviews and secondary literature, and see what kinds of business options were feasible and could hence be recommended.

I. The first round of meetings

1. Head of Oromia Forest Enterprise (Dr. Girma Amante)
2. Head of Frankfurt Zoological society (Thadaigh Baggallay)
3. Director of Ecopia (Dr. Mutsal Kifleyesus-Matschie)
4. Local coordinator (Kinfe Mamo)
5. Project director of Born Free (James Young)
6. SOS-Sahel (Feyera Abdi)

II. Second phase of interviews

Used Methodology: Key Informant Interviews

Key informant interviews were held with the various organizations. Key informant interviews are qualitative in-depth interviews with people who are experts in their field. The purpose is to collect information from a diverse group of informants, incl. potential buyers in a semi-structured manner. Two techniques are commonly used when conducting key informant interviews: telephone and face-to-face interviews. In this case only face-to-face interviews were held, although there was one exception. Even though this is more time consuming, the information output is generally much higher and better.

Oromia Coffee cooperative

The MMA consultant (Marc) and BERSMP representative (Lulu) had an interview with the Director of the Oromia coffee Cooperative, Mr. Dessalegn Jena. After general remarks the following main points came out of the discussion:

- Mr. Dessalegn Jena shared his experience when working with other NGO projects (similar to BERSMP). Among other things he mentioned that many NGO's who are buying products from farmers for a premium price, are afterwards unable to sell coffee as a premium (price) product; eventually even suffering losses. Moreover he stated that quite some NGO's are disturbing the market, instead of developing it.
- The cooperative buys three sort of coffee from the western side of Oromia, 2 types from the southern and also coffee from (Bale) southeast; all through their cooperative members.
- To get a premium price the coffee from Bale needs to be certified as a forest coffee and the quality needs to be improved.
- The cooperative have members in Dello Mena, in total 143 cooperative member groups. They outsource the coffee production to their members. 28 of these cooperative members are fair trade certified and 30 are organic certified (out of 143). The whole process is traceable, which is a requirement to be in organic and/or FT market.



- The Oromia coffee Union is one of the only ones who can by-pass the commodity exchange and directly export. They were already (2008), successfully selling specialized coffee to European buyers.
- He commented that for exporting it's highly recommended to export minimal 18.000 kg (one container). Their volume for 2008 was 4000 metric tons. For fair trade they sell their coffee for 1.70 dollar (per pond = less than half a kg).
- The price of buying will be based on the prices of the commodity exchange. Moreover he commented that the demand for fair trade coffee is increasing.

Contacts:

- 1) Kagera coffee Union (KRU).
- 2) Sedama Union (Addis) 0911-247326 (25)
- 3) Private trader: Abdula Baga 0911-201310

SOS SAHEL PROJECT:

The MMA consultant (Marc) and BERSMP representative (Lulu) had a open discussion with SOS-Sahel. The following main points came out of this discussion:

- Their honey project in the Kaffa zone (Ethiopia) worked for 3 ½ years and than the project suddenly stopped. It was suppose to end after five years but due to a conflict with the government it ended earlier. Match Maker Associates assisted to develop this project with a value chain analysis and based on their advise the project trained beekeepers, created farmer groups (cooperatives at Woreda level) and set up collection points.. Furthermore six cooperatives were organized in 5 Woreda and half of the farmers were joining the cooperative. Market linkages with regional/national/export just started but than, due to the stated conflict, the project had to stop.
- One of the major constrains was the lack of an export license for the Kaffa honey; certified as a fair trade and/or organic product.
- Moreover cooperation with the private sector wasn't very successful. First the project started to work with the honey enterprise APINEC, but APINEC was not paying fair prices according to SOS-Sahel. Also cooperation with Beza Mar, another big private actor, didn't work out.
- The markets in the Middle East and Europe were, according to SOS-Sahel, especially attractive. Also because Ethiopia recently gained the permission to export to the EU.
- BFE, according to SOS-Sahel, has great potential as they can by pass the commodity exchange, bulk on Addis level and can export.

SNV

The MMA consultant (Marc) had a meeting with senior employees from the Dutch NGO SNV: Shireraw Meskerem and Agnes G. Luz (Value Chain specialist on honey). The main points, coming out of the discussion, were the following:

- SNV informed the consultant that there is a coordination VC meeting every three months. Which discusses possible strategic interventions in the honey sector.
- SNV worked closely together with private companies like Beza Mar, which is a leading organization in the honey sector. In total 26 organization are involved in this project, 9 of them are private and 6 companies are licensed to export. SNV is the one providing training to the different actors.



- The Ethiopian wax and honey processors & export association is important organization, who is trying to stimulate the marketing and export of honey.
- SNV explained the opportunities of the new Kenyan beehives. Modern beehives can costs up to 800 ETB and even Kenyan beehives may costs around 500 birr. But the renewed Kenyan beehives, which are made of local material, only costs 50 to 100 birr. When local materials are available, many beekeepers are even making the beehives themselves. This makes the adaption process relatively easy and might play an important role in solving the biggest bottleneck in the sector; low volumes.
- It was stressed that the prices for national honey are higher than international; which makes it less attractive to export.

Contacts: Solomon 0911-791410

Expert of min. of agriculture

The MMA consultant (Marc) and Lulu (BERSMP) had a meeting with an expert of the ministry of agriculture. The following points were discussed:

- All commodities have to go through the Ethiopian Commodity Exchange (ECX) and only a few organizations (like the Oromia coffee Union) can bypass it. Because the ECX is a new thing the participation is still rather low, moreover the international coffee prices aren't very favorable at the moment (first half of 2009).
- A recent law regarding (e.g. organic) certification is recently implemented and hereby-new criteria have to be met.
- A license is needed to bring products to the Commodity exchange. Than a grading system is used: 1-2-3 grades are high quality coffee's and it goes down to 9; which is the lowest quality coffee.
- A hard copy was given on coffee prices in the different regions of Ethiopia, which gave the consultant insight in the position (quality and prices) of Bale Coffee compared to coffee's from other regions.
- It was explained that the high quality coffee is all exported and the lower quality coffee will be sold locally.

USAID Eco-tourism expert

The MMA consultant (Marc) and Lulu (BERSMP) had a meeting with an Eco-tourism expert called Biniyen. In an open discussion the following points came out:

- According to the expert the main tourist segments in Bale are:
 - a) Birdwatchers.
 - b) Nature/ trekking lovers.
 - c) Bag packers.
 - d) Expats.

There are different tourist groups visiting the Bale area. One of them are expatriates and they travel mostly by their own means. Many birdwatchers do use a tour operator and are mostly coming with the tour operator called Quadrant. Quite some nature and trekking 'lovers' are coming with Adoney tour operator but also by themselves. The backpackers come mostly by themselves but hardly reach the BERSMP project Woreda's.

- The major constrains to attract more tourist are listed underneath:
 - a) The infrastructure (road) is insufficient and this makes the trip long (around eight to twelve hours by car/bus) and uncomfortable. Flights to Bale have stopped, although



- flights – according to a conversation between PR person of Ethiopian airlines and the interviewee– might be re-opened.
- b) Accommodation facilities in the four-project areas are poor and hardly existing. The provision of tents, guesthouses and especially home stays (in traditional houses) could solve this problem.
 - c) Moreover, Biniyen stated, many tour operators have a lack of knowledge on Bale and thus the perception of the potential of Bale is limited. However Bale is presented in a trade fair – organized 3-4 times a year – but this doesn't really help to attract tourist and tour operators to the area. The trade fair is jointly organized and financed by Ethiopian airlines and the government.
 - d) Moreover the project areas are misses a local tour office.
- As mentioned before a potential tourism group is the bag packer (mostly adventures youngsters). Their accommodation, hotels, hostels etc., use in Addis Ababa, are not (yet) offering a package deal for a 4-5 days stay in bale area. The interviewee found it a wise idea to contact these accommodations and set up this package; which might boost the amount of tourist coming to the project areas.
 - Moreover he stated that only 85 kilometers from Goba Woreda (the biggest potential tourist hotspot within the four project Woreda) there is a popular tourist place. Which, for him, shows the feasibility of developing it also in Goba Woreda.
 - Especially as Goba has many things to offer: nature, coffee tours (which are becoming highly popular), community-based tourism etc.

Contacts:

- a) Touroperatour 'Adoney Ethiopia' (Samuel 0911688007)
- b) Touroperatour 'Quadrant' Tony Hiki (0115157990)
- c) Coordinator of US-aid eco-tourism program, Dr. Rown 0912-600409.
- d) www.afroalpinetrekking.com

Coffee exporter from Bale

The MMA consultant (Marc) and BERSMP livelihood expert (Lulu) had a short telephone interview with a coffee exporter called Abdula Baga.

- Although this exporter was not able to meet us, he did provide important price information; e.g. he bought Bale coffee for 35 birr per kg. But due to changing market circumstances (introduction of ECX and decreasing world prices) he wasn't able to sell the Bale coffee for a profit.

Coffee export Haicof

The consultant had a meeting with the general manager of Haicof; which is a coffee exporting private company. He shared the following information:

- He estimated the profit margin of exporters, when taking good and bad periods together, on 2 to 5 %. He strongly states that hardly any company in the world earns a lot of money with coffee: as the price fluctuation is very high. One year you might make a fortune but the other year the exporter might loss a lot.
- In 2008 he sold 17 kg of high quality coffee for 700 birr.
- Concerning packaging material he advised to use Juts-bags (Asian clothes).



- Because of the auction there is hardly any branding possible; which is a clear constrain when working with foreign buyers; who want to exactly trace the origin and likewise brand it.
- He moreover stated that roasting coffee is an important value adding activity and explained about the complexity of it.
- Transport from and to Bale can, according to him, take quite long (almost a week) and the costs are also quite high.

Quadrant' tour operator

Marc and Lulu had a meeting with the director of Quadrant (Tony Hiki) and the following points were noted:

- He stresses the importance of the involvement of the private sector and finds it crucial to develop eco-tourism in and outside Bale.
- Quadrant's target group were Wealthy America's and Europeans with high requirements. To satisfy this group well-educated and fluently English speaking guides, excellent facilities, western toilets, good cooks etc. are needed.
- He is convinced that throat fishing has huge potential in Bale region; especially in the project area around Goba.
- The interviewee doesn't think that bag packers are the most interesting and profitable clients for Goba Woreda. As they will do most things by themselves and moreover they are on a tight budget; low community spin off as a possible consequence.
- He recommends introducing a fishing license (fees), especially for the potential fishing area in Goba Woreda. When the facilities (first-class accommodation can be a lodge or big luxurious tent), good trained guides and high-quality food & drinks) are there, he will be eager to work in Bale (Goba Woreda).
- Although community based tourism is important and he wants them to benefit from it; his main focus is on satisfying his client.
- He suggests that the tourists should pay a small park fee, which can go directly back to the community.
- Going into the trend of Westerns wanting to do something for the nature/climate, introducing like Memorial trees, might further enhance the attractiveness of Bale. Tourist can than buy a tree and dedicate it to a person they love. But also trees can be bought as to do something back for the nature. But also coffee tours proved to be a very good attraction for tourists.
- He charges his consumers like 100-150 dollars per night.

To sum up according to Quadrant three things are needed to the development areas: good accommodation (western standards), excellent food & drinks and well trained guides!

Flower Fair

The consultant and the BERSMP livelihood expert visited the flower Fair to orientate on opportunities regarding bio-pesticides. As a consultant report identified bio-pesticides as a opportunities was identified in BERSMP project areas, by a previous consultants report.

The private company BioBee declared that they are very much interested in adding bio-pesticides to their portfolio, instead of harmful chemicals. It was suggested to follow it up by sending a sample, when a final product is there. The mother company of BioBee is in Israel (www.bioBee.com) and the site www.omni-agri.com.can can be checked for further information. Axum Greenline trading Plc and the Ethiopian Horticulture Producers Exporters



Association (EHPEA) showed similar interest. They were both already looking for bio-pesticides instead of chemicals. But haven't yet found anyone yet.

Travel Ethiopia

The consultant, together with BERSMP livelihood expert, had an interview with the tour manager of Travel Ethiopia 'Mr. Kedir Kemal'.

- Travel Ethiopia worked in Bale for several years, mostly by organizing tracks in Bale. However immediately the clear constrains in the four-project areas in Bale were pointed out. First of all insufficient infrastructure (locally as the main road from Addis), lack of appropriate accommodations, no well trained and fluent English speaking guides and western meals aren't there or are not up to standard.
- Therefore he uses guides and equipment from Densio area and Travel Ethiopia organizes one to five days trekking from there. Local guides in the project areas are not good enough.
- He also sees great potential in trout fishing in Bale (Goba).
- The market segment of elderly, if accommodation and infrastructure improve, might be interesting. For middle aged and young this is not a pre-condition.
- He things investors from the region - they don't need to be involved in tourism - could be interested to invest in local accommodations and other facilities. But this has to be done in close cooperation with tourist operators and/or local tourist experts.
- The tourist groups in Ethiopia are coming to see historical places, nature sports, trekking places and wide range of tourist; from young to old. Bale is number 5th or 6th on the list of hotspots in Ethiopia.
- Cooperation between hotels and tour operators are not yet set up. He believes this might create great win-win situations.
- Community based tourism is important for him and his clients and thus he is imbedded to do to support this in the project areas.
- He markets himself mainly through the internet and hence most of his clients book through it.
- Travel Ethiopia focuses on the middle-income tourists; which contribute most to Ethiopian tourism.

Beza Mar

Lulu and Marc met with the general manager of the private companies Beza Mar 'Haile Giorgis Demissie' and general manager of APINEC 'Mr. Woubset'. The following findings came out of the discussion with Beza Mar:

- Beza Mar follows a new strategy, starting from 2009. Instead of producing honey on own land they want to engage producers in different districts in the country; Bale is one of the regions they consider engaging with. Already in 2004 they had a piece of land in the Southwest, from which they produced their own honey, but it wasn't their main strategy anymore.
- The company sales fair-trade honey to Europe (UK & Germany) and they use a local agent to gain and maintain these relations.
- To develop the skills of farmers they found it important to work closely with the farmers. The aim for this close cooperation is to increase the volumes, which will benefit both. To do that they are organizing, together with NGO's (Cordaid and SNV), trainings at farm level. To financial support the farmers, a successfully discussed with banks in Oromia were held. Although they haven't been finalized.



- For Beza Mar the current honey coming from Bale is not good enough. Especially the moisture level is too high; the moisture level should be around 18.5 or maximum of 20 percent of the honey. The final buyers are very sensitive on this front. Beza Mar had similar problems in South-West region in 2004 and in the following years – by training and working closely together with the farmers – the quality (e.g. lower moisture level) and the quantity significantly increased.
- They have their own lands but they are also interested in working together with the BFE. Beza Mar sees it as an attractive partner who can act, at least in the initial stages, as a wholesaler.
- The overall constrain in the honey sector, are low volumes, which is mainly due to the high consumption of the Tej brewers. Because the demand is exceeding the supply, the local prices are so high. Which makes only a few specific niche markets attractive (profitable) for export. In these niches the price can be relatively high (mainly when fair-trade and organic certified) but the requirements are also high.
- The importance of post-harvesting practice is often overlooked but crucial; i.e. good storage, traceability of the product and uses of good package material. Moreover the honey producers should use ripe honey and don't harvest too early. For a honey processor it's also essential -especially when entering the export market- to be organic/FT certified, have ISO, HCO etc. licenses.
- The owner indicated that European buyers require the honey to be liquid.
- He highlights the huge potential of specialty honey; i.e. medicinal honey or white honey.
- Beza Mar sells their fair trade and organic honey for around \$ 3 per kg . In 2008 the price was a bit higher due to favorable market circumstances; in 2009 the prices went down again.
- Beza Mar is the first Ethiopian company to export organic certified wax.

Apinec

- Apinec agro-industry was a joint venture between Apinec and two Dutch companies 'Trichilia and Clootwijk'. The joint venture was set up in 2005. Apinec had his own Apiri's, workshop (training center) and there they worked directly with the farmers. Apinec is supported by the Dutch NGO Cordaid. As the certifying process is almost completed, they will soon expect to start exporting. Around 10% will go to the local market and 90 % will go the export market. Their focus will be on the organic and fair-trade market. They want to export both honey and beeswax.
- Due to bad experiences he doesn't want any middleman, government body or NGO in between the farmers and Apinec.
- Mr. Woubset declared stated that the requirements for a honey processors are:
 - 1) Reliable input supply.
 - 2) ISO, HAS and others licenses are there to guarantee the quality of the production process. These are needed to European (US) buyers to buy the honey from Ethiopia. But processors also have to think about the standard for containers and about food hygiene standards like HACCP.
 - 3) Being able to sample.
 - 4) Set up a system for traceability.
 - 5) Good and clean storage.
 - 6) Moreover buyers demand documentation on packing material.
 - 7) Farmers probably will need containers to transport; which their farmers for example don't have it.
 - 8) Also an internal control system (for quality control etc.) can't be forgotten.



- They are currently working in the South-West of Ethiopia (Bongo) and they are very interested in honey from Bale; but cooperation with the BFE isn't appealing for Apinec based on, in their view, unrealistic prices previously requested by the BFE.
- He stresses that quality, competition and the honey sensitivity are other important elements to be dealing with.
- He states that only five Ethiopian honey companies have the processing standard (ISO etc.).

Meeting with the association of honey processors and exporters with the head being Solomon

- The association started at 2005 and has grown from 13 members to currently 60 members (2009). The staff consists of a general manager, accountant and secretary. They are working closely together with SNV.
- Through a joint effort with SNV, permission was granted to sell honey to the EU.
- The honey export focuses on specific niche markets. Currently Ethiopia is the 9th producing country of the world but most honey is domestically consumed.
- For honey processors it's important to get HACCP certification and the moisture content should not be higher than 19 to 20 percent.
- Ones again the low quantity of honey was stated to be the major bottleneck and thus increasing the production at farm level has the association's primarily focus.
- Most European companies prefer semi-processed honey; so they can label and brand themselves. Moreover many also want to process the final phase themselves, as to add their own specific wishes in the honey.

III. Third phase of interviews

The findings above and other sources gave an insight in the business options for the BFE to pursue (see document 'Final VC options'). The underlining actors were interviewed to cross check and verify earlier finding and the information is included in the VC reports;

- The Eastern African Bamboo project
- Bamboo flooring maker 'Adal industrial
- Director of Ecopia (Dr. Mutslal Kifleyesus-Matschie)
- Director Travel Ethiopia (Kedir Kemal)
- Director coffee producer AZ
- Eco-tourism company Lintos
- Eco-tourism company Adoney Ethiopia (Samuel)
- Fintracs (NGO)
- Two bamboo producers in Addis town.



ANNEX V: NAMES OF BERSMP AND BFE STAFF MEMBERS

Bereket Assefa – BERSMP PNRM Advisor

Sahlemariam Mazmur – BERSMP PNRM Advisor

Seyoum G/Kidan – BERSMP PNRM Advisor

Lulu Likassa – BERSMP Livelihoods Advisor

Husein Indries – BERSMP/BFE Capacity Building Advisor

Getachew Oumer – BERSMP Nensebo Woreda Facilitator

Endiyo Mi'eso – Nensebo Government Counterpart

Girma Ayalew – BERSMP Goba Woreda Facilitator

Nadew Tesema – Goba Government Counterpart

Girma Ayele – BERSMP Dello Mena Woreda Facilitator

Mulugojjam Beyene – Dello Mena Government Counterpart

Haptamu Yehualashet – BERSMP Harena Bulluk Woreda Facilitator

Kenea Dida – Harena Bulluk Woreda Facilitator

Belay Asfaw – BFE Manager

Mengistu Taddese – BFE Forestry Expert

Mussa – BFE

Million – BFE

Adem Mohammed - BFE

Janbo Woliy – Arsi Forest Enterprise

Zegeye Kibrit – Ethiopian Wolf Conservation Project