

COUNTRY PROFILE

ETHIOPIA



Full Name:	Federal Democratic Republic of Ethiopia
Area:	1,127,127 km²
Capital:	Addis Ababa
Main Languages:	Amharic, Oromo, Tigrinya, Somali
Currency:	birr (ETB)
Head of State:	President Woldegiorgis Girma
Prime Minister:	Meles Zenawi



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The authors accept sole responsibility for the profile which does not necessarily reflect the views of the organizers: Pro€Invest, the Centre for the Development of Enterprise (CDE), the European Investment Bank (EIB), the African Union (AU) and the Common Market for Eastern and Southern Africa (COMESA).

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1. BUSINESS OVERVIEW

1.1 Key Economic Indicators

Table 1 shows the recent trend for selected key economic indicators using the most up-to-date available information.

Table 1: Key Economic Indicators 2002-06

	2002	2003	2004	2005	2006
Population (mn.)	67.220	69.102	71.037	73.026	75.071
Population Growth (%)	2.8	2.8	2.8	2.8	2.8
GDP (US\$ bn. at current prices)	7.335	7.942	9.733	11.174	13.264
GDP per capita (US\$ at current prices)	109	115	137	153	177
GDP growth at constant prices (%)	0.0%	(3.1%)	12.3%	8.7%	5.4%
Current Account Balance (US\$ bn.)	(234)	(0.178)	(0.499)	(1.013)	(1.343)
Inflation Rate (%)	(5.7)	14.4	11.1	4.6	4.9
Exchange Rate: Annual average Ethiopian birr to US\$	8.5678	8.5997	8.6356	8.68	8.69

Sources: COMTRADE, World Development Indicators, Oanda.com

1.2 Economic Context

In 2006, total Gross Domestic Product (GDP) amounted to almost US\$13.3 billion at current market prices. Following the war with Eritrea in the late 1990s and the famine in the early years of this decade, Ethiopia's growth in real terms has been relatively strong and broadly-based between 2004 and 2006. Its economy is dominated by agriculture and the services sector. The Government estimates that agriculture contributes some 49 percent to GDP, services about 42 percent and industry, the remaining 9 percent.

The Government implemented a successful programme under the enhanced Heavily Indebted Poor Countries (HIPC) initiative that enabled the country to reach the completion point in this programme in 2004. As a result, total debt service relief under this initiative from all its creditors amounted to \$3 billion in nominal terms.

The international donor community plays a significant role in Ethiopia's development. According to the OECD statistics, it received an annual average of \$1.878 billion in net overseas development assistance in 2004 and 2005. The United States was by far the largest single bilateral donor averaging \$552 million, followed by the United Kingdom (\$111 million), Germany (\$89 million), Canada (\$62 million), Sweden (\$60 million), the Netherlands (\$58 million) and Italy (\$49 million). The World Bank, through the IDA, provided an annual average of \$403 million in these same two years followed by the EU (\$143 million) and the African Development Bank (\$102 million) among the multilateral organisations.

1.3 Population and Labour Force

The population was estimated at over 75 million in 2006. The overall population density is approximately 67 persons per km². A recent survey estimated the labour force, including those economically active above the age of ten years, at 52 percent of population. Over 80 percent of employment is in agriculture.

1.4 Role of Tourism

According to research carried out by the World Travel & Tourism Council (WTTC), Ethiopia's travel and tourism economy (direct and indirect impact) in 2007 is expected to account for 9.2 percent of GDP and 7.1 percent of total employment.

1.5 General Institutional and Regulatory Framework

Since 1992, the Government has successfully implemented a series of reform programmes in order to encourage the wider participation of the private sector in the development of the national economy. Such reforms include promulgation of a liberal investment law for the promotion and encouragement of private investment, both foreign and domestic. As part of the Government's commitment to insure efficient service delivery and create an enabling investment environment, the formerly cumbersome bureaucratic procedures have been significantly simplified.

Land tenure

Under Ethiopia's system, all land belongs to the Government, but both urban and rural lands may be made available to investors at competitive prices on a leasehold basis. Rights on the use of urban land range from periods of 50 to 99 years. Lease rights can be transferred together with built facilities. Under both federal law and each regional government's own laws, the land rights are transferred within 60 days after receiving an application for the allocation of land for an approved investment. Both the regional government and the Ethiopian Investment Commission facilitate the allocation of land for foreign investments. Investors in export-oriented projects are given priority to acquire land at a reduced price. However, under this system, land cannot be used as collateral for loans.

1.6 Local Skills Base

As in many African countries, unemployment is high in Ethiopia and labour is plentiful and inexpensive. However, the labour force is relatively unskilled and on-the-job training is essential.

The Catering and Tourism Training Institute is responsible for providing training for persons entering the hotel and tourism sectors.

1.7 Infrastructure Services

1.7.1 International air access

Air

The main international airport is Bole International Airport at Addis Ababa, which is located some 8km southeast of the city. The Aba Tenna D Yilma International Airport at Dire Dawa also has a few international flights, mostly from small airlines of Arab countries, including Air Djibouti.

The national airline is Ethiopian Airlines (ET), which operates between Ethiopia and most major capitals. Other airlines serving Ethiopia include British Airways, Djibouti Airlines, EgyptAir, Kenya Airways, KLM, Lufthansa, Saudia, Sudan Airways and Yemenia.

Rail

A rail service between Djibouti and Addis Ababa is run jointly by the two governments.

Road

The main route is via Kenya. There is an all-weather road from Moyale on the border to Addis Ababa. The following border points are also open: Dewale/Galafi (from Djibouti) and Humera/Metema (from Sudan). The road linking Nairobi and Addis Ababa forms part of the Trans-East African Highway.

1.7.2 Internal transport

Air

Ethiopian Airlines runs internal flights to over 40 towns, although services may be infrequent. Ethiopian Airlines also operates a Historic Route Service for tourists, taking in the most famous historic sites. Airports throughout Ethiopia are currently being upgraded in a step to encourage tourism.

Rail

The only working line runs between Addis Ababa and Djibouti, via Dire Dawa and Harar.

Road

A good network of all-weather roads services most business and tourist centres. Otherwise, 4-wheel drive vehicles are recommended. Frequent fuel shortages can make travel outside Addis Ababa difficult. Bus Services throughout the country are run by the government as well as private companies.

1.7.3 Telecommunications

Telephone: IDD is available. The country code is 251.

Mobile: Telephone: roaming agreements exist with most international mobile phone companies. Coverage outside Addis Ababa is patchy and largely confined to major urban areas.

Internet: There are internet cafes in Addis Ababa. Some top-end hotels also offer services, although connections may be difficult. Service is rapidly improving as demand soars.

2. TOURISM SECTOR

There has been strong and sustained growth in international visitor arrivals in recent years, the number having almost doubled from 103,000 in 1995 to 210,000 in 2004 and an estimated 227,000 in 2005.

2.1 Product Offer

Addis Ababa

Ethiopia's capital is located at an altitude of 2,440m in the central highlands. Places of interest include the National Museum, the Menelik Palace, the Jubilee Palace, the Meskal (Revolution) Square, St George's Cathedral, the Ethnology Museum and the mercato, one of the largest markets in Africa.

Natural Attractions

Ethiopia offers a variety of landscapes: Afro-Alpine highlands rising to around 4,300 metres, moors and mountains, the Great Rift Valley, white-water rivers, game-filled savannah, giant waterfalls, dense and lush jungle. Ethiopia's many national parks enable the visitor to enjoy the country's scenery and its wildlife, conserved in natural habitats, and offer opportunities for travel adventure almost unparalleled in Africa. Safaris are usually in 4-wheel drive vehicles but walking safaris (with a guide only) or travelling by mule are also possible.

The main national parks and protected areas are:

- Abjatta-Shalla Lakes National Park located some 215km from Addis Ababa;
- Awash National Park lying in the lowlands east of Addis Ababa;
- Bale Mountains National Park in the southern part of Ethiopia;
- Dallol (or Danakil) Depression in the Afar region where the Ethiopian Rift Valley meets the Red Sea;
- Gambella National Park in the west of Ethiopia; and
- Lake Tana, the largest lake in Ethiopia and source of the Blue Nile with numerous islands and monasteries that can be visited. The spectacular Blue Nile Falls are situated about 35km from Bahar Dar.

The wildlife consists mainly of East African plains animals, including oryx, bat-eared fox, caracal, armadillo, colobus and green monkeys, baboons, klipspringer, leopard, bushbuck, hippopotamus, gazelle, cheetah, lion, kudu and over 450 species of bird.

Cultural Attractions

Ethiopia has culture and traditions dating back over 3000 years, with over 80 different ethnic groups with their own language, culture and traditions. The strong religious setting, celebrations and festivals play an important part in every one's daily life.

Archaeological and Historical Attractions

Ethiopia is the earliest known home of humankind. Hadar (situated 160km north-east of Addis Ababa) is registered as a UNESCO World Heritage Site where the skeleton of a female who lived 3.5 million years ago was discovered in 1974. There are seven UNESCO World Heritage sites in Ethiopia – as many as Egypt.

The principal historical attractions are

- Axum (or Aksum): the capital of the earliest Ethiopian kingdom is renowned for its multi-storeyed ancient carved granite stelae, its archaeological remains and its church, which claims to house the Lost Ark of the Covenant;
- Debre Damo monastery in Tigray province in northern Ethiopia which is said to be the oldest existing intact church in Ethiopia;
- Gondar which was the capital of Ethiopia from 1632 to 1855 is the site of many ruined castles;
- Harar, a famous Muslim walled city with 99 mosques and the centre for the coffee trade; and
- Lalibela, famous for its 12th-century, rock-hewn churches of which Bete Medhane Alem is believed to be the largest monolithic church in the world.

Other activities for tourists include

- Hiking and pony trekking in such areas as the Simien Mountains, the moorlands of the Bale Plateau; and the countryside around Lalibela;
- Climbing in the Simien Mountains, the Bale Plateau and many other areas;
- Swimming in the Rift Valley, especially Lake Langano;
- Natural springs in the Awash National Park and at Sodere Filwoha;
- Fishing in the streams of the Bale Mountains and lakes in the Rift Valley;
- Sailing and organised boat trips are available on Lake Tana;
- White-water rafting on parts of the Omo River and the Blue Nile; and
- Caving near Dire Dawa.

The Ethiopian Millenium

The upcoming Millenium ceremony (celebrating 2000 years of Christianity according to the Ethiopian calendar) is a good opportunity to show the local and international community that Ethiopia has many untapped tourism resources and potential to offer. Preparations are under way to create a conducive situation to visitors travelling on this occasion: manmade and tourist attractions and destinations are being identified, movable heritages collected from the public are currently being displayed in a museum, maintenance of roads accessing tourist destinations is being undertaken and registration of numerous heritages is also carried out.

Meetings and Conferences

Ethiopia has a state-of-art conference facility in Addis Ababa (the United Nations Conference Centre) and its major hotels also have excellent meeting rooms. Addis Ababa also has an exhibition centre.

2.2 Accommodation

According to the latest Ministry of Tourism information, there were some 3,500 rooms in tourist accommodation establishments in Ethiopia in 2003. In the same year, a total of 391,000 nights were spent by non-residents (inbound tourists) in hotels and similar establishments. Recent additions to the hotel stock include the 120-room Dioplopol in Addis Ababa, a new hotel in Dukem and three lodges in Afar, Oromiya and Southern regions.

2.3 Market Trends

2.3.1 Visitor arrivals

The estimated number of foreign visitors was 227,000 in 2005, of which around 46 percent are from other African countries (particularly Djibouti) and 24 percent from Europe (particularly the United Kingdom, Italy, Germany and France). Ethiopians living overseas have not been shown separately after 2002. Details are given in Table 2.

Table 2: International tourist arrivals, 1995-2005

Nationality	1995	2001	2002	2003	2004*	2005*
International tourist arrivals	103,336	148,438	156,327	179,910	210,000	227,000
<i>of which</i>						
<i>Other Africa</i>	30,595	61,234	59,640	82,152		
<i>Europe</i>	35,652	32,540	34,280	43,647		
<i>Middle East</i>	9,300	9,908	9,189	14,366		
<i>Americas</i>	13,743	14,514	19,433	27,456		
<i>Rest of World</i>	4,200	10,738	11,722	12,289		
<i>Overseas nationals</i>	7,846	19,504	22,063	..		

* estimate

Sources: Ethiopian Tourism Commission and World Tourism Organisation

Mode of transport

Practically all international visitors arrive in Ethiopia by air, apart from some overland travellers from Djibouti and neighbouring African countries.

2.3.2 Visitor expenditure

In 2004, international tourism receipts amounted to an estimated \$173 million compared with \$114 million in 2003 and \$57 million in 2000. This compares with exports earnings from coffee of approximately \$350 million in 2006.

2.4 Institutional Arrangements

The main responsibility for tourism development and promotion lies with the Ministry of Culture and Tourism. The main private sector bodies are the Ethiopian Hotels Association, the Ethiopian Tour Operators Association, the Eco-Tourism Association, the Tour Operators and Travel Agencies Employers' Association, the Wild Life Association, the Cultural Historical Heritage Association, Addis Woubet (Ethiopia's first NGO devoted exclusively to the preservation and sustainable management of historical Heritage Sites in Addis Ababa) and the Ethiopian Chamber of Commerce.

2.5 Future Outlook

Ethiopia is optimistic about future prospects for the tourism sector, building upon the substantial improvements that have been made to the tourism infrastructure and the opening to new markets in the Far East (e.g. China) as well as ongoing promotional activities in established markets such as Europe and the United States. Strong prospects exist in the international meetings, incentive travel, conferences and exhibitions (MICE) market.

According to the WTTC, Ethiopia's travel and tourism industry is expected to grow by 0.7 percent in 2007, and by 3.0 percent per annum, in real terms, between 2008 and 2017.

3. INVESTMENT OPPORTUNITIES IN TOURISM

3.1 Tourism Development Potentials

Ethiopia possesses a variety of tourist attractions and offers numerous opportunities for the development of tourism projects. Shortages of adequate accommodation establishments and related facilities for sports, recreation and entertainment have affected the growth of the tourism in both the relatively well-established northern tourist circuit (known as the Historic Route) which contains many of the country's best-known tourism sites and the less developed southern, eastern and south-western parts of the country.

Ethiopia's tourism sector is poised to benefit from a programme of upgrading expansion and new construction of airports, road and communications networks, electricity generation and water supply which is currently underway in various parts of the country. These are being financed from both internal and external sources, including the World Bank.

Prospects for investing in the tourism sector are also enhanced by the

- Existence of important tourism assets presenting numerous tourism development opportunities all over the country;
- Limited capacity of hotels of international standard;
- International recognition of Ethiopia as one of the world's most favoured destinations for nature-based and cultural tourism;
- Close co-operation between public and private sectors; and
- The liberalised investment climate.

A recent World Bank study "*Ethiopia: Towards a Strategy for Pro-Poor Tourism Development, June 2006, Africa Private Sector Development*" proposes an action plan for Ethiopian Tourism development that includes four strategic objectives: Sector Management strengthening, Creating and enabling environment, Product development and Market development. It is estimated that these proposed strategic interventions would enhance tourism growth by a conservative 50 % over a 5 year period.

3.2 Investment Sites

The following sites and opportunities have been identified in the National Tourism Development Plan as being potentially attractive to foreign investors:

- Abjatta-Shalla Lakes National Park - establishing the necessary tourism infrastructure including a hotel, camping sites, and thermal and mud baths;
- Awash National Park – lodges for tourists interested in observing or hunting wildlife, or in enjoying the spa waters found at the park;
- Semien Mountains National Park – a lodge for visitors to the park;
- Sof Omar Cave Development Project – development of tourism infrastructure, including roads, electric lighting, a tourist facility centre with a hotel and restaurant; and
- Hotels along the Historic Route – at least three hotels at Bahir Dar, Lalibela and Mahalle where the shortage of accommodation is most acute.

4. INVESTMENT ENVIRONMENT

4.1 Investment Framework

4.1.1 Government policy

A foreign investor is allowed to invest in all sectors except those reserved for Government, Ethiopian nationals and other domestic investors. The areas of investment exclusively reserved for domestic investors include 'hotels other than those star-designated, motels, pensions, tea rooms, coffee shops, bars, night clubs and restaurants excluding international and specialised restaurants' as well as travel agency, trade auxiliary and ticket selling services, and air transport services using aircraft with a seating capacity of up to 20 passengers. A foreign investor, who intends to invest on his/her own, is required to invest not less than \$100,000 in cash and/or in kind as an initial investment capital per project.

4.1.2 Investment agencies

The Ethiopian Investment Agency (EIA) is the principal government organ responsible for promoting, coordinating and facilitating foreign investment in Ethiopia. EIA is accountable to the Board of Investment (BOI). Regional Investment Offices (RIOs) have also been established to promote and handle local investments in their respective regions. There is a strong linkage between EIA and RIOs with respect to technical assistance, the exchange of information and provision of investment facilities. The EIA serves as a one-stop shop for all foreign investment in Ethiopia. It

- provides the necessary information required by investors;
- receives investment applications;
- approves and issues investment permits to foreign investors;
- provides registration services to newly incorporated business organizations;
- issues trade and operating licences to approved foreign investments;
- provides advisory and aftercare services to investors;
- approves expatriate posts and issues work permits to foreign employees;
- facilitates the acquisition of land by foreign investors in accordance with the relevant laws of the Federal and Regional Governments; and
- renders other pre-and post investment approval services.

4.1.3 Double taxation agreements

The Government has recently been introducing a series of measures to reform the tax system with a view to encouraging investment and foreign trade. On the whole, the reform process is to reduce the rates but broaden the base. Ethiopia has already concluded tax treaties with a number of countries and is also ready to conclude similar treaties with other countries for the purpose of avoidance of double taxation.

4.1.4 Investment guarantees

Ethiopia is a member of the Multilateral Investment Guarantee Agency (MIGA) which protects investors against non-commercial risks. Ethiopia has also signed the World Bank treaty, the *International Convention on Settlement of Investment Disputes between States and Nationals of other States (ICSID)*. The Constitution also protects private property, while the Investment Code provides additional guarantees against measures of arbitrary expropriation and nationalisation.

4.2 Investment Incentives

To encourage private investment and promote the inflow of foreign capital and technology into Ethiopia, the following incentives are granted to both domestic and foreign investors engaged in areas eligible for investment incentives:

- full exemption from the payment of import customs duties and other taxes levied on imports for importation of all investment capital goods, as well as spare parts, provided that the goods are not produced locally in comparable quantity, quality and price. Hotels (other than non-star designated hotels) are eligible for such exemptions from customs duty;
- full exemption from the payment of any export tax and other taxes levied on exports of Ethiopian products and services;
- any income derived from an approved investment is exempted from the payment of income tax for periods up to seven years, depending upon the area of investment, the volume of export, and the location in which the investment is undertaken. The Council of Ministers may also award profit tax holiday for periods greater than seven years; and
- business enterprises that suffer losses during the tax holiday period can carry forward such losses for half of the income tax exemption period following the expiry of the exemption period.

4.3 Access to Finance

The National Bank of Ethiopia (NBE) is the country's central bank. It is responsible for regulating the money supply, lending and deposit interest rates, and keeping control of inflation.

4.3.1 Commercial banks

The Commercial Bank of Ethiopia (CBE) is the largest bank in Ethiopia, accounting for somewhere between 70 to 90 percent of the commercial banking market. The bank has branches in all the main cities and towns. Other banks include the Awash International Bank; Bank of Abyssinia; Construction and Business Bank; Dashen Bank; Wegagen Bank; UNITED Bank; NIB International Bank; LION International Bank; ACCESS Bank (currently under formation) and the Cooperative banks.

The main development bank is the Development Bank of Ethiopia (DBE) which used to be called the Agricultural and Industrial Development Bank.

4.3.2 International Financial Institutions

Ethiopia, as a signatory to the agreement between African, Caribbean and Pacific nations (ACP) and the European Union, known as the Cotonou Agreement, has access to the facilities of the European Investment Bank (EIB).

As a member of the World Bank, the facilities of the International Finance Corporation (IFC) would also be available for projects in Ethiopia. Other potential development finance sources include the African Development Bank (AfDB), and the New Partnership for Africa's Development (NEPAD).

4.3.3 Transfer of Capital and Profits

Capital repatriation and remittance of dividends and interest is guaranteed to foreign investors under the Investment Proclamation. Any foreign investor has the right, in respect of an approved investment, to make the following remittances out of Ethiopia in convertible currency at the prevailing exchange rate on the date of remittance:

- profits and dividends accruing from an investment;
- principal and interest payments on external loans;
- payments related to technology transfer or management agreements;
- proceeds from sale or liquidation of an enterprise;
- proceeds from the sale or transfer of shares or of partial ownership of an enterprise to a domestic investor; and
- compensation paid to a foreign investor;

Expatriates employed in an enterprise may remit, in convertible foreign currency, salaries and other payments accruing from their employment in accordance with the foreign exchange regulations or directives of the country.

4.4 Residential and Work Visas

Visas are required for all foreign visitors to Ethiopia, with the exception of nationals of Kenya and the Sudan. Visa applications may be obtained at Ethiopia's diplomatic missions overseas. However, nationals of 33 countries (including most EU and OECD member countries) are allowed to receive their tourist visas on arrival in Ethiopia.

The Department for Immigration and Nationality Affairs issues a residence permit to a foreign investor, upon submission of an Investment Permit issued in his/her name. A foreign investor, who is a share holder of a company or branch company, and an expatriate staff member who has a work permit, is also entitled to a residence permit. The EIA can facilitate the issue of such work permits to foreign employees.

4.5 Technical and Promotional Assistance

Generic tourism promotion is undertaken by the Ministry of Culture and Tourism and the Ethiopian Tourism Commission. The comparatively small marketing budgets are complemented by private sector marketing initiatives.

5. LIST OF KEY CONTACTS

Ministry of Culture and Tourism

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Ethiopian Tour Operators Association

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