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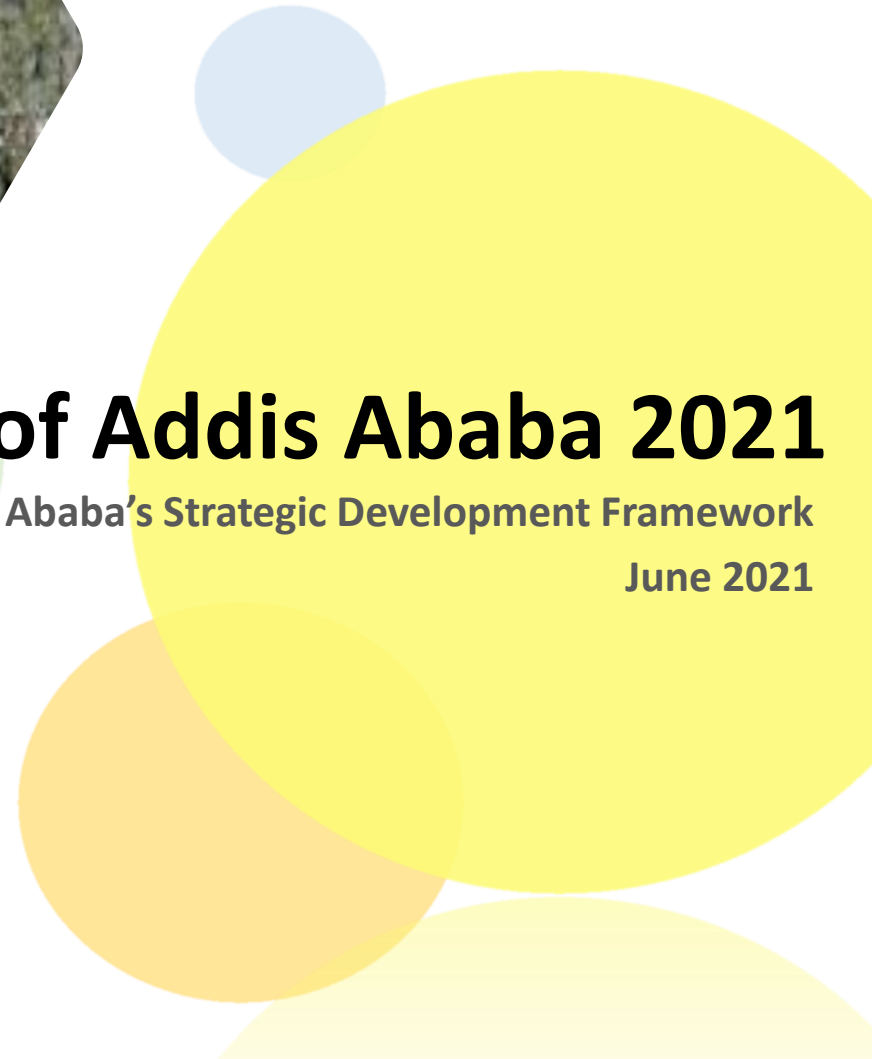
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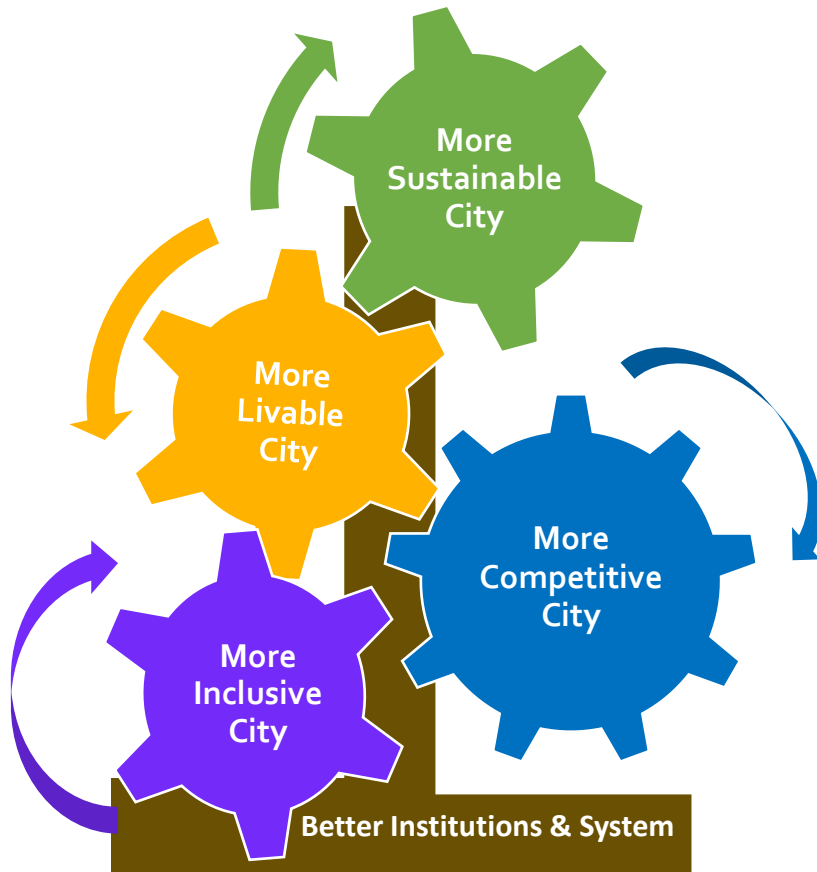
# Future of Addis Ababa 2021

: Addis Ababa's Strategic Development Framework

June 2021



# Objectives



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To **address complex challenges** that require integrated interventions

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To shift the approach **from sector-specific to spatially integrated** challenges and solutions

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To **coordinate multi-sector efforts** to maximize development synergies and impacts

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To identify **prioritized interventions for key binding constraints**

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To contribute to the City's 10-year development roadmap towards **more competitive, livable, sustainable and inclusive city**

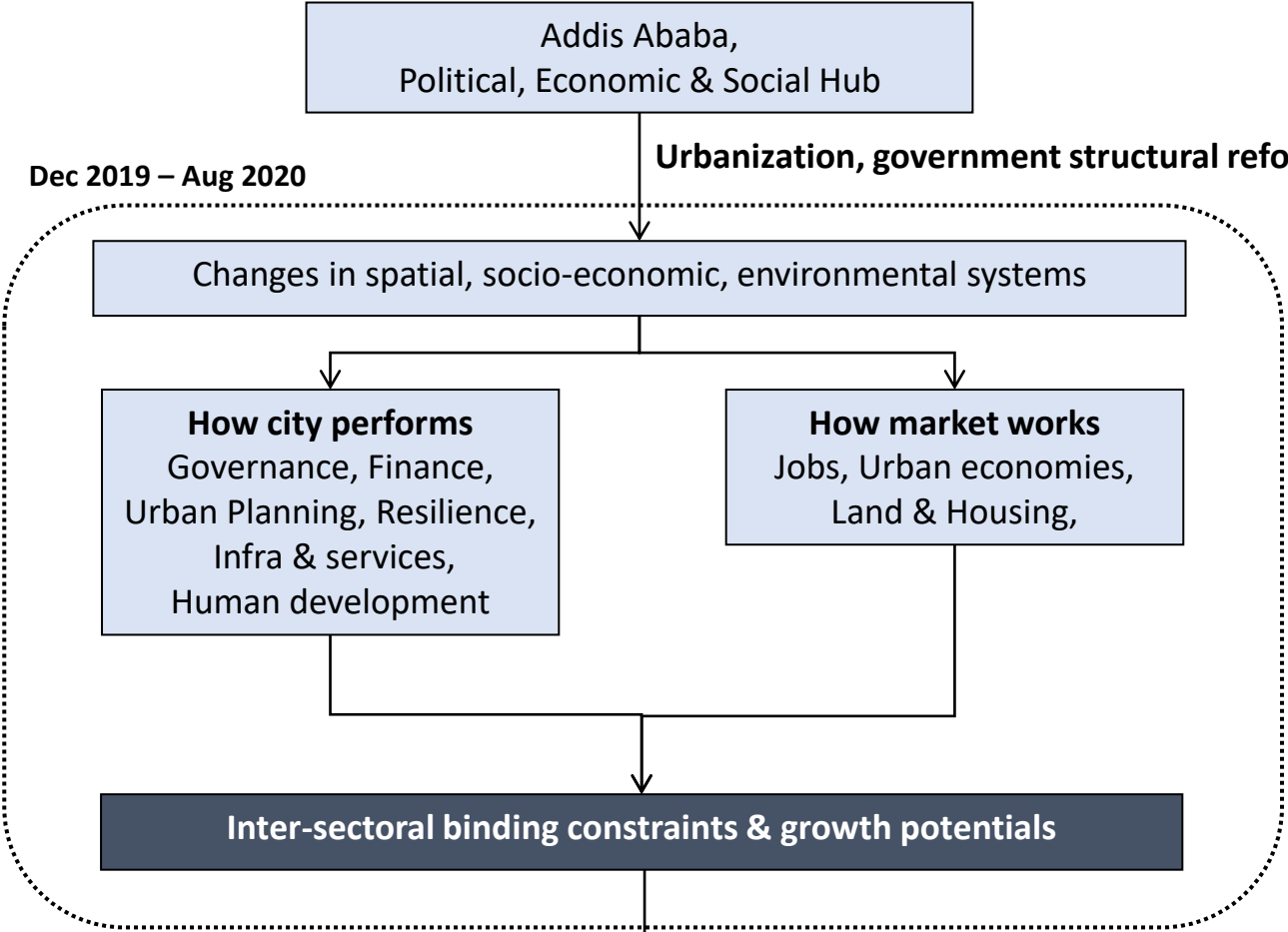
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# Analytical Framework

Phase I: Diagnostics

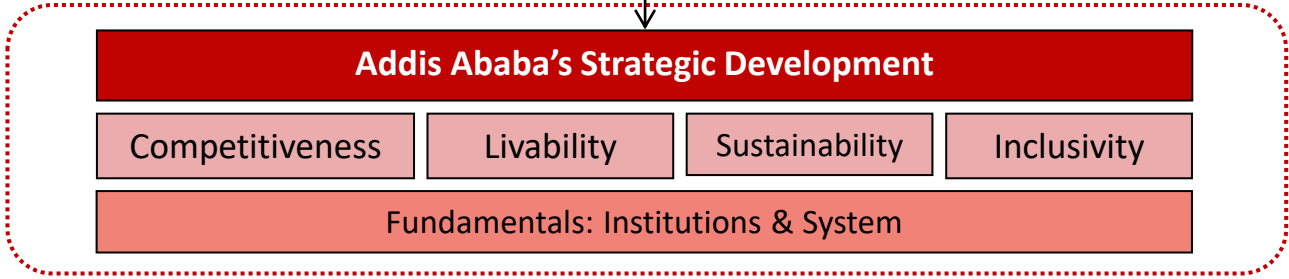
Dec 2019 – Aug 2020

Urbanization, government structural reforms, climate change



Current Phase II : Outcomes & Actions

Sep 2020 – Jun 2021



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- I. Opportunities: Addis Ababa is growing rapidly
  - II. Challenges: Growth also comes with challenges
  - III. Root causes: Key binding constraints to be addressed
  - IV. Ongoing efforts: Government of Ethiopia and DPs
  - V. Proposal: Addis Ababa Strategic Development Framework
  - VI. Technical Annex I – Development Framework Details
  - VII. Technical Annex II – Diagnostics Details
  - VIII. Technical Annex III – List of Participants
  - IX. References
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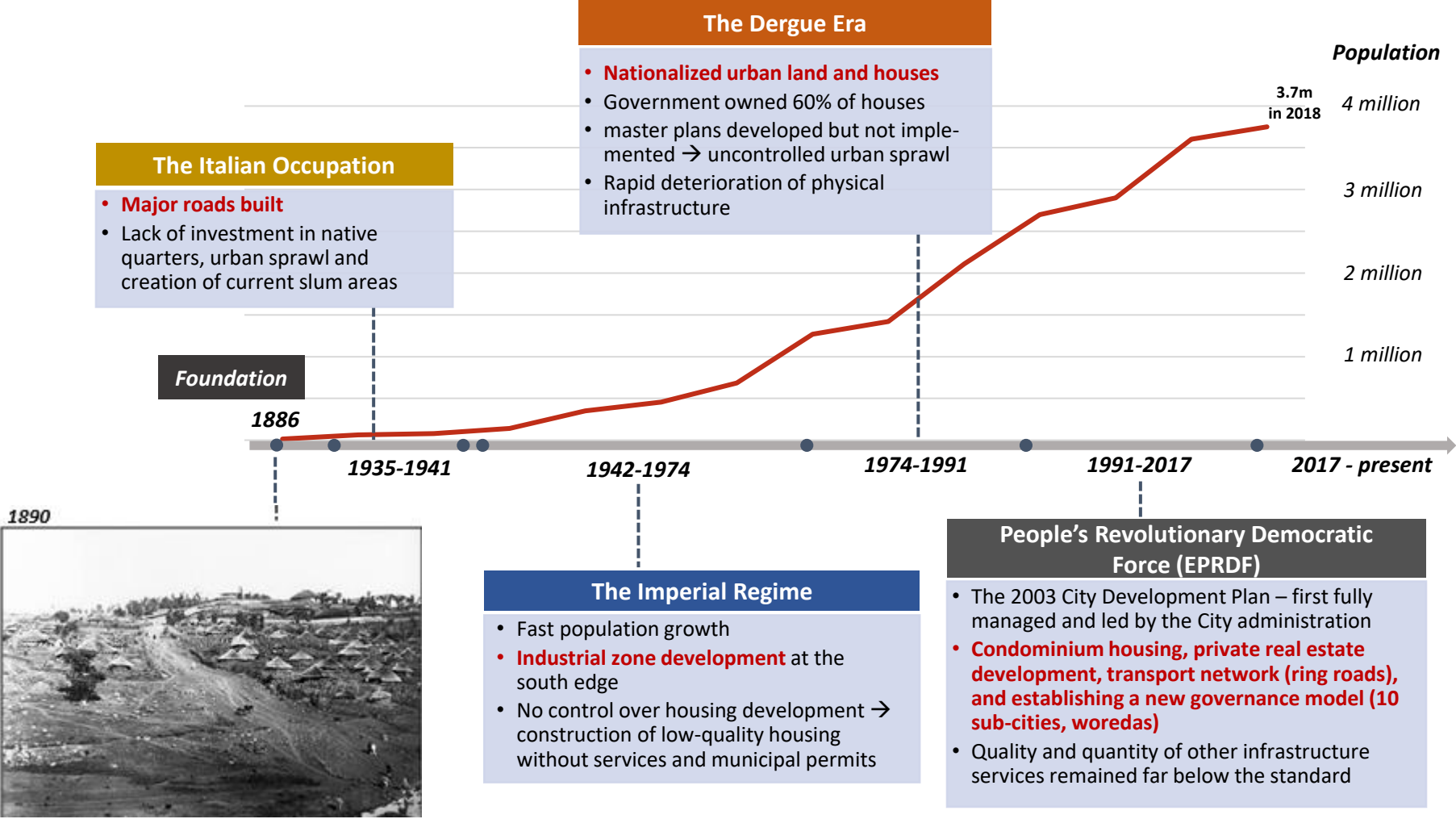




**Opportunities:**

**I. Addis Ababa is growing rapidly**

# Addis Ababa: “New flower” in a new vase



**Today**

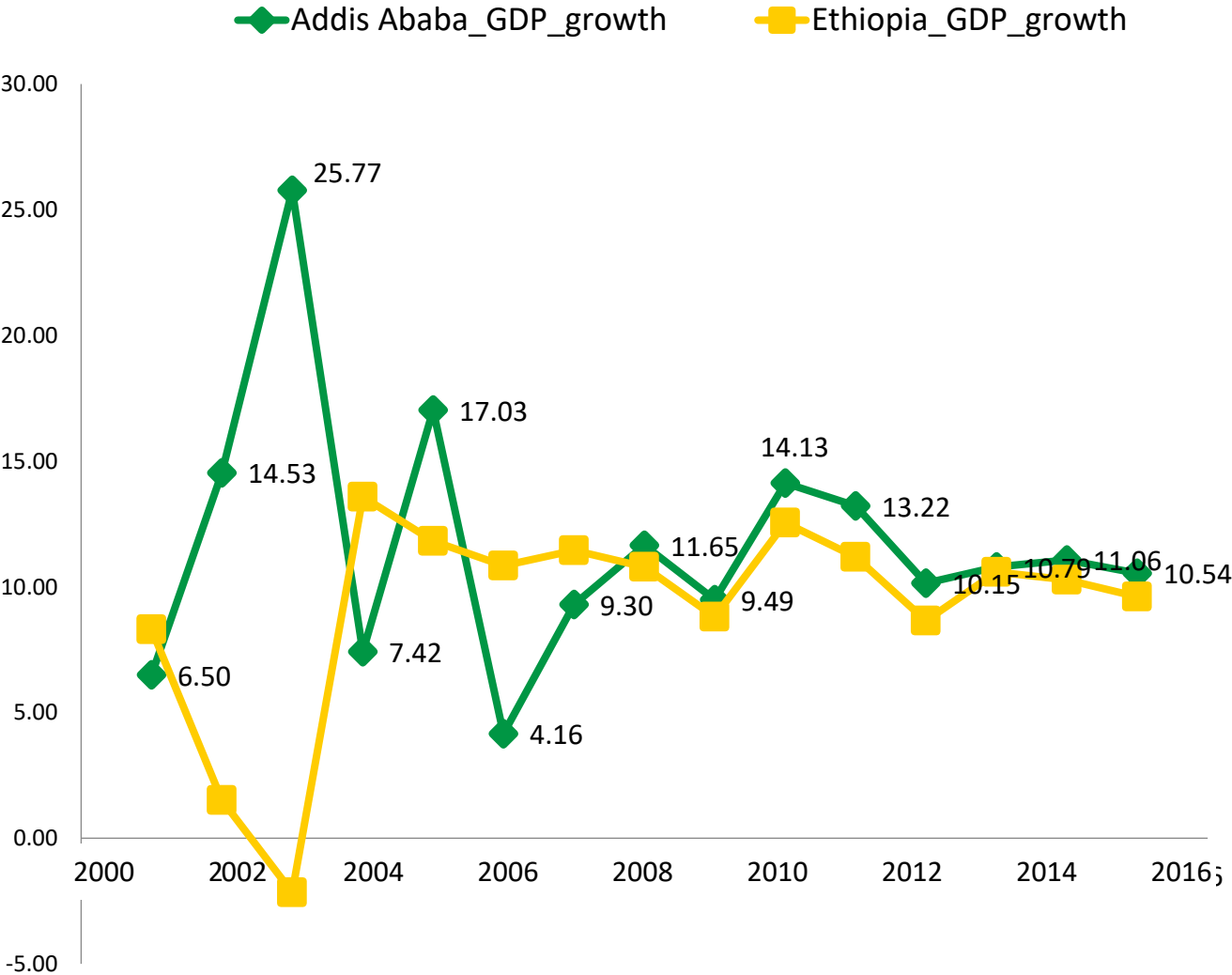


- ✓ Africa's leading gateway
- ✓ Diplomatic capital of Africa
- ✓ Intangible cultural heritage

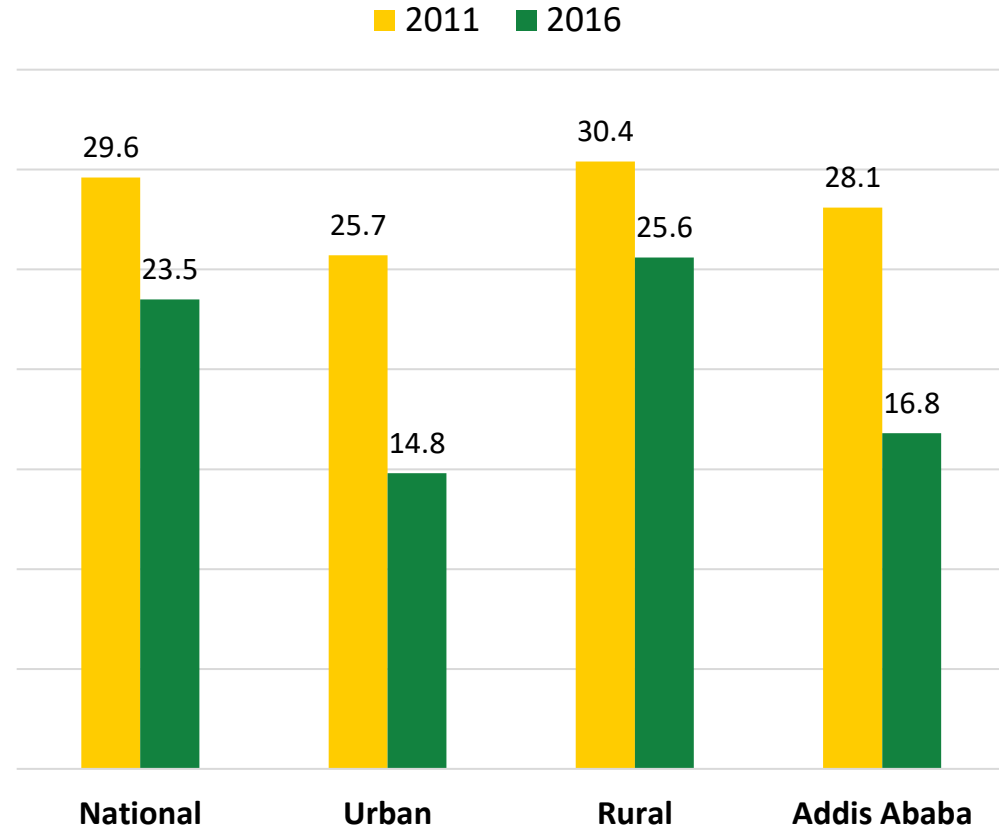
Source: Alemayehu & Stark (2018), Woldeamanuel (2020), Tufa (2008), UN Habitat (2017), Burdett et al. (2018), AACPPPO (2017), Mahiteme (2007), CSA (2016a), CSA (2007, 2016b), CSA (2006b, 2016a), CSA (2018), CSA (2012a), CSA (2016a, 2016b)

Note: The title adopted from <https://lsecities.net/archives/addis-ababa-new-flower-in-an-old-vase/>

# Addis is the largest, fast growing, demographic, economic and political center of Ethiopia, leading the country's socio-economic development



Poverty Headcount Rate (%) based on national poverty line 2011-2016

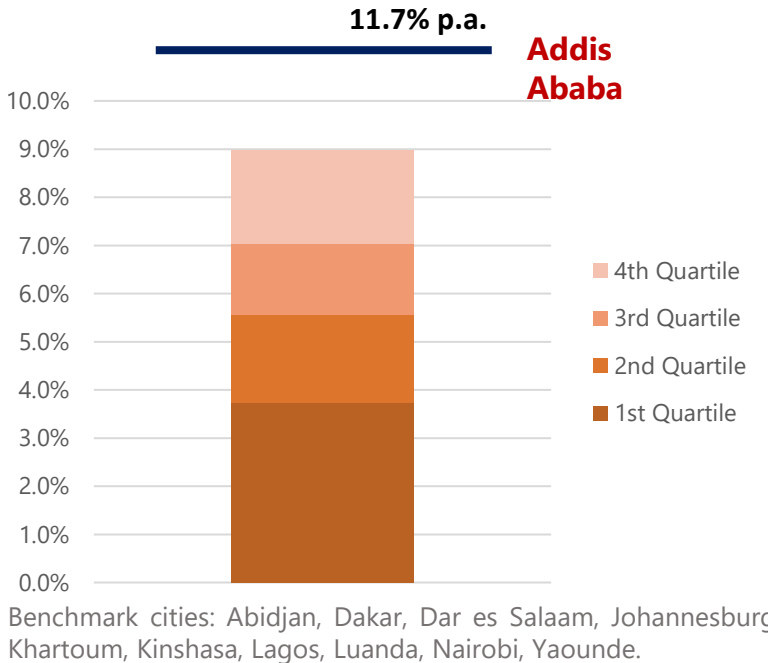
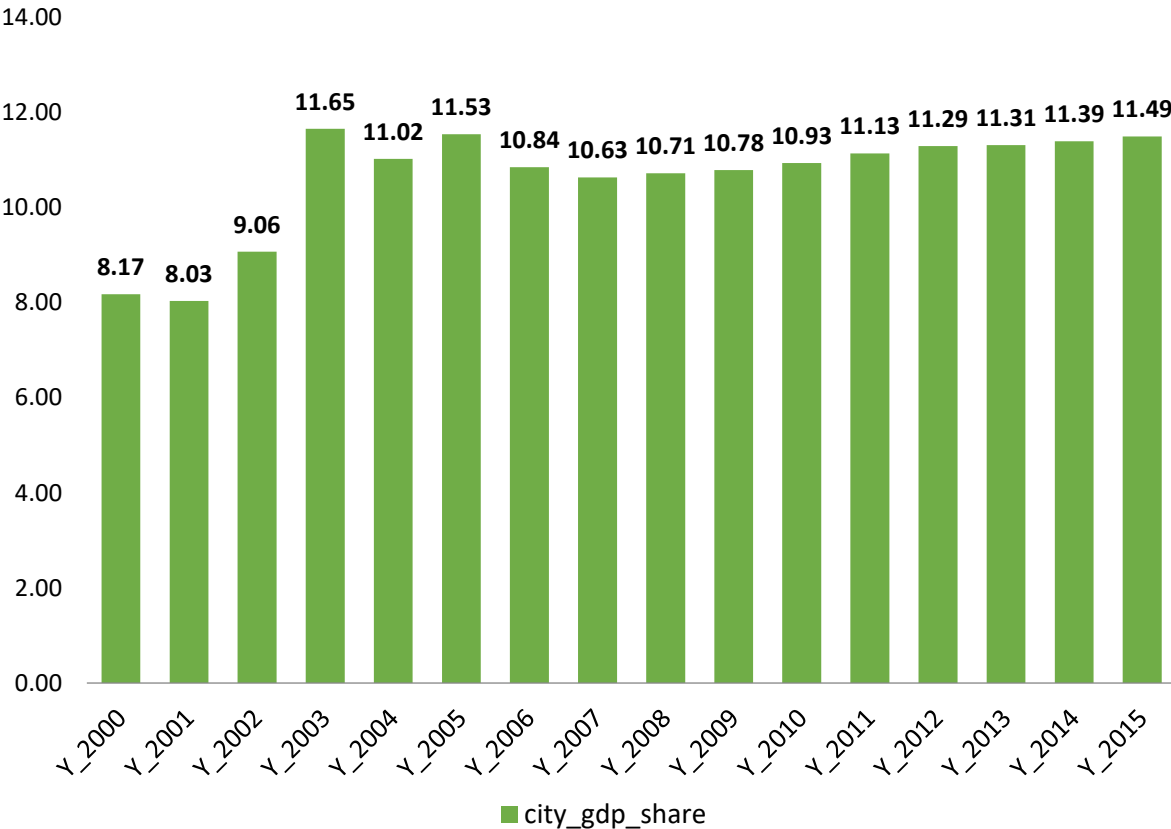


Source: Oxford Economics - Global Economic Databank

Source: World Bank (2020)

# Addis' GDP share of the national economy remains at 10-11% since 2003 serving as a main economic hub and its growth excels peer African cities

Addis Ababa GDP Share



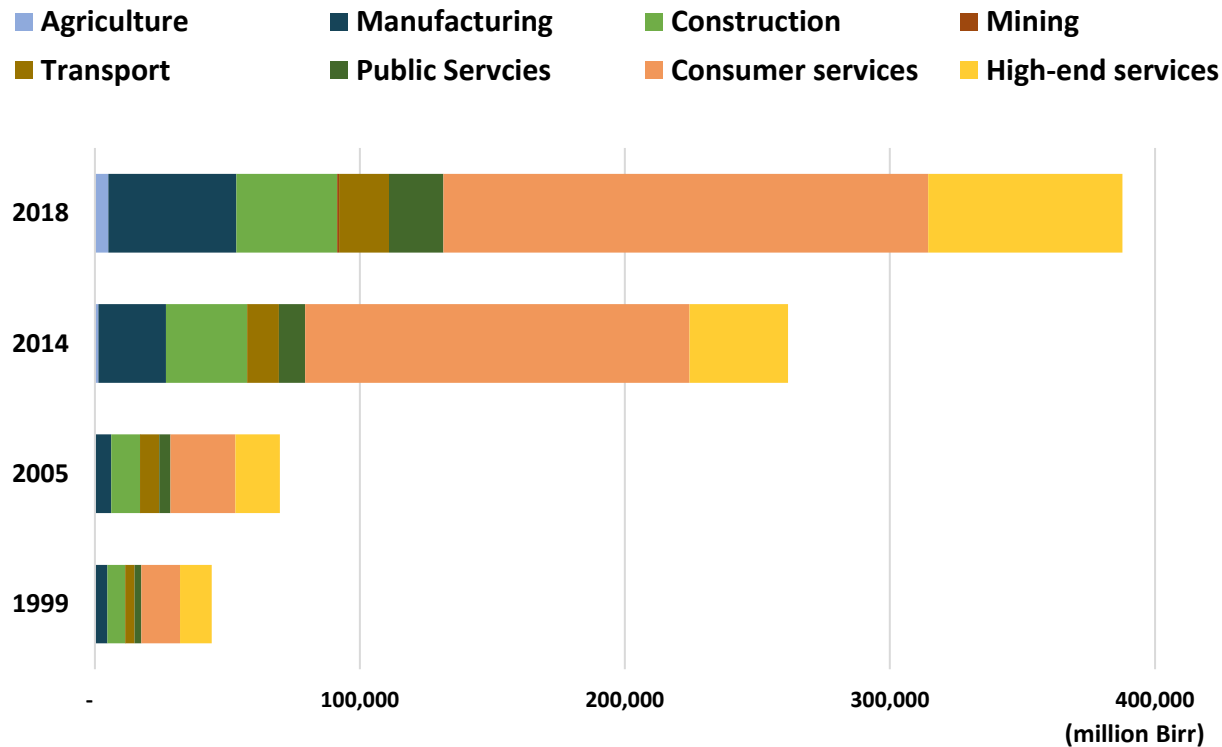
Between 2000-2015 Addis Ababa GDP growth at 11.7% p.a. in average, much higher than other African cities

Disclaimer: Although the data found here has been produced and processed from the Oxford Economics believed to be reliable, no warranty expressed or implied is made regarding accuracy, adequacy, completeness, legality, reliability or usefulness of any information.



# Economic transition is ongoing and the GVA increases over time; More people work for high-end services and public services and their GVA shares increased

Addis Ababa GVA by Sector (1999 – 2018)

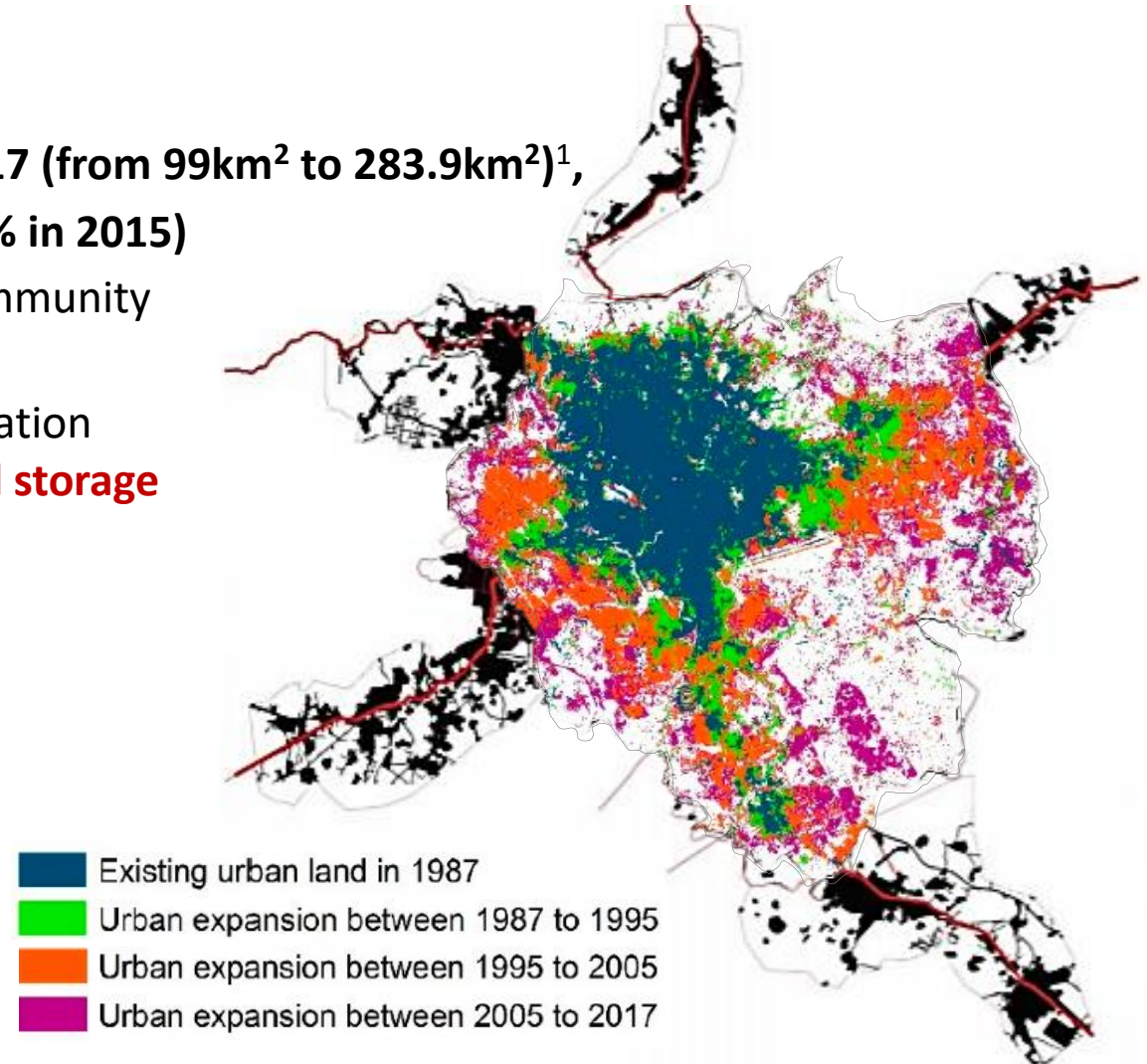


Sectors	Employment Share (%)			GVA Share (%)		
	2014	2018		2014	2018	
High-end services	7	9	↑	14	19	↑
Consumer services	42	44	↑	55	47	↓
Public Services	15	18	↑	3.8	5.3	↑
Transport	6	8	↑	4.6	4.8	↑
Mining	0.9	0.4	↓	0.01	0.2	↑
Construction	12	8	↓	12	10	↓
Manufacturing	16	13	↓	10	12	↑
Agriculture	1.4	0.6	↓	0.5	1.3	↑

Note: GVA share (%) is only indicative, calculated using the values rebased at the disaggregated sub-sector level which does not sum up to the total sector value (base year of 2015/2016).

# Addis is growing; Built-up areas increase faster than the population growth and the land use patterns are changing

- **Three-fold increment in urban land between 1987 and 2017 (from 99km<sup>2</sup> to 283.9km<sup>2</sup>)<sup>1</sup>, corresponding reduction of forest (from 21% in 1986 to 5% in 2015)**
- **In central 4 sub-cities:** Land for residential housing and community services converted to **retail and business operation**
- **In surrounding 6 sub-cities:** Land for agricultural and vegetation areas converted to **residential housing, manufacturing and storage**



Note: 1. Population in Addis has increased from 1.42 million in 1984 to 3,75 million in 2018 (2.6 times). The density (people/built-up area km<sup>2</sup>) has decreased from 17,000 in 1987 to 13,000 in 2017, calculated using the estimated population figures. For estimated population figures, see slide #6.

Source: Overlapping the maps from the World Bank (2015a) and Terfa, Chen, Liu, Zhang, & Niyogi (2019)

# Addis is expected to continue to grow fast and drive national growth

- to maintain the momentum and tighten the link with economic growth, urbanization should be managed proactively

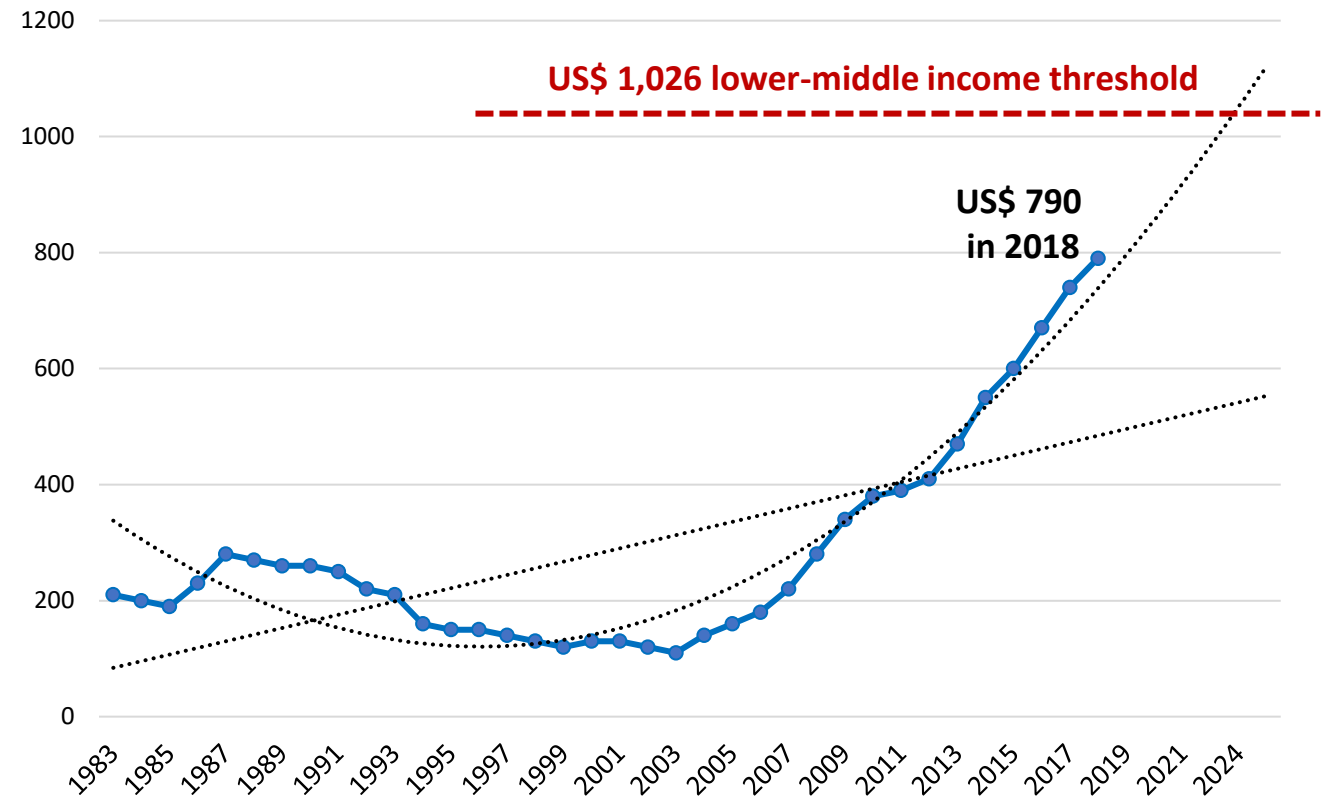
If managed well, the rapid urbanization will:

- *Connect jobs and workers*
- *Connect businesses*
- *Connect urban residents to more extensive markets*
- *Connect people, housing, services, environment*



**Attain lower-middle income country status by 2025**

GNI per capita for Ethiopia, Atlas method (Current US\$)



Note: The dotted lines are exponential and linear trendlines.



**Challenges:**

**II. Growth also comes with challenges**



**While leading Ethiopia's socio-economic growth, Addis Ababa faces significant challenges to cope with rapidly growing demands for jobs, housing, infrastructure as well as increasing hazards and risks, affecting the city's competitiveness, livability, sustainability, inclusivity**

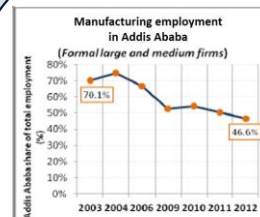


# Competitiveness

Despite strong economic growth, Addis lags behind in creating quality jobs and enabling environment, and its economic transformation is slow

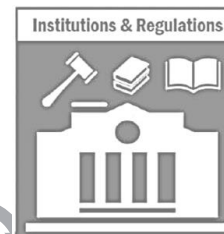
## Slow economic transformation

- Employment in Addis's specialized medium-value-added manufacturing subsectors are decreasing (moving to outside Addis)
- High employment share (79%) in services of which 20% in retail trade
- Still nascent high-value-added manufacturing and services



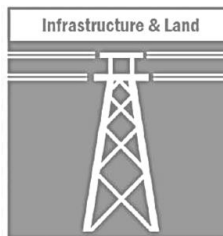
## Disabling business environment

- 168 out of 190 countries in the area of starting business
- Too many, over specified business licenses: 11 Procedures, 32 days and 45.4% of income per capita to start a business
- Construction permit cost (12% of warehouse value) – compared to 1.5% in OECD high income country



## Limited access to land and services

- Lack of formal land supply far below the demand; only 5% of land auctioned
- Low reliability of land administration system
- Frequent power outage
- Unreliable water, sanitation, SW services



## Low connectivity, accessibility & poor ICT

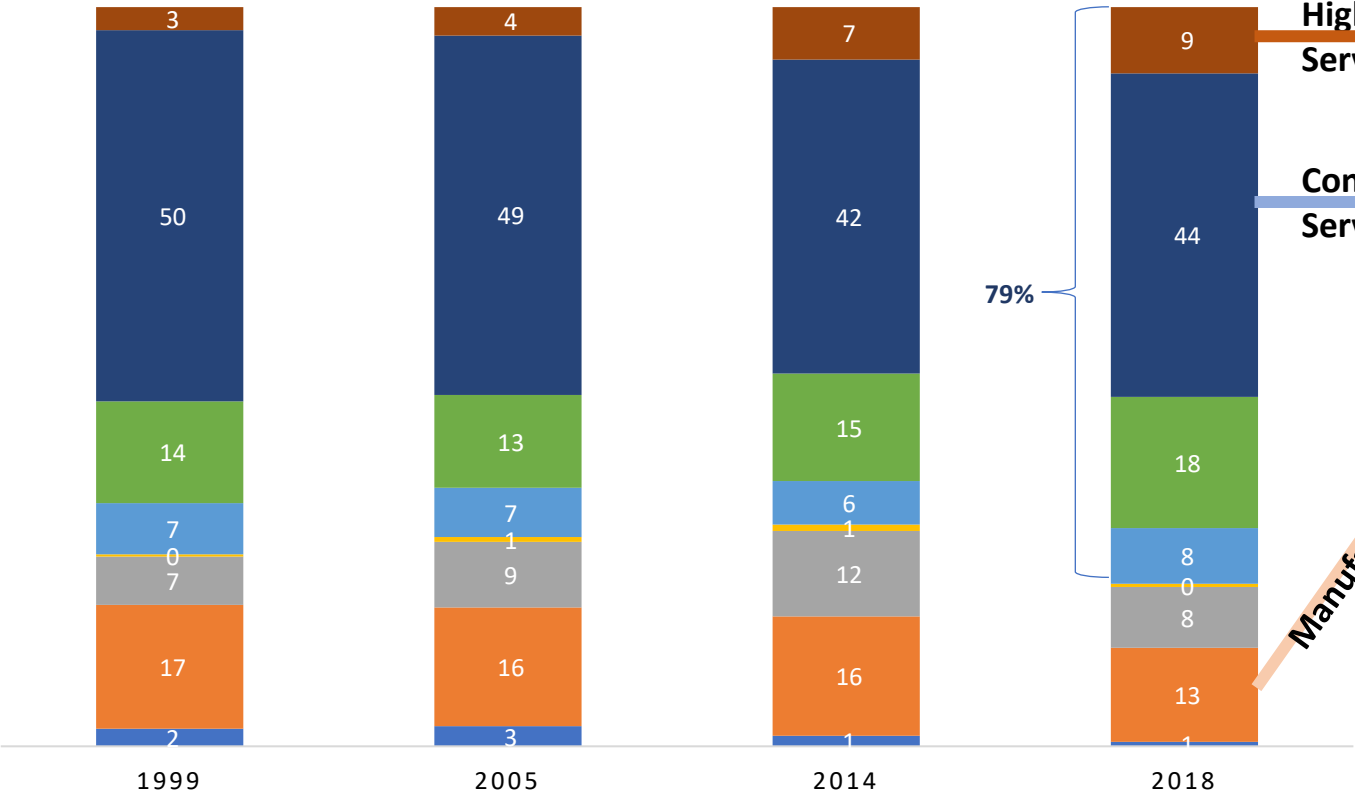
- Spatial mismatch between jobs, housing, and services
- Transport and infrastructure not adequately supporting accessibility
- Congestion and pollution compromise agglomeration effects
- Poor ICT infra & efficiency



# Economic transition is slow to the next stages of job creation: Towards high-value-added services and manufacturing

Addis Ababa Employment Share By Sector (1999-2018)

- Agriculture
- Manufacturing
- Construction
- Mining
- Transport
- Public Services
- Consumer services
- High-end services



### Services: Major employer, 79% in 2018

- Employment in high-value-added services increasing 3% in 1999 → 9% in 2018
- Still high employment share (20%) in wholesale and retail trade

### Manufacturing: 13 % in 2018

- Employment in Addis’s specialized medium-value-added manufacturing subsectors are decreasing (moving to outside Addis)
- Not ready for high-value-added manufacturing: Still nascent 0.16% of the Addis labor force in 2018

Source: CSA (1999, 2006a, 2014, 2018); World Bank (2018)

# Economic transition is slow to the next stages of job creation: Barriers to enabling business environment for firms



- **168 out of 190** countries in the area of starting business
- **Too many, over specified business licenses** requiring multiple licenses for closely related activities
- **Costly process:** 57.8 of GNI per capita for business start-up



- **Lack of formal land supply**
- **Low reliability of land administration system**
- **Frequent power outage:** In average, 8.2 times in a month in 2015



- **Low availability of credit:** only 3% of small business and 23% of medium businesses
- **Short-term loans and long and delayed process of loan approval**





## Housing and Informal Settlements

With rapid in-migration from rural areas and high natural population growth, Addis faces a massive housing shortage. Informal households trade off housing quality for access to jobs; the alternative is to move to outskirts with limited connectivity and services.



## Mobility and transport

High traffic congestion and low mobility: Public transport lacks fleet and quality service and is unable to meet the travel demand. Although 54% of residents walk to work, only 12% of roads have pedestrian pathways. Pedestrian safety, blockage by vendors and parking, and lack of consideration for people with disability are also challenges.



## Green space

Green space has shrunken from 21% in 1986 to 5% in 2015; Only 0.4–0.9 m<sup>2</sup>/capita available compared to WHO recommended 9m<sup>2</sup>/capita. Reduction of green space affects the city's resilience to hazards and disasters



## Disaster risk

Vulnerable to natural & man-made disasters; disappearance of green space responsible for 40% of the flooding and landslides, while expansion of built environment increases flood risk: +28% runoff potential, +60% flood volume.



## Electricity

An average household experiences power outages more than 8 times per month. The ageing electricity network is overloaded and not able to provide reliable service.



## Water & wastewater

Only 21 out of the city's 116 woredas have access to continuous water supply and less than a third of the city's residents have access to sewerage connections.



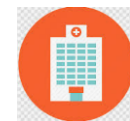
## Solid waste

Up to 80% collection rate; uncollected and dumped wastes in ditches, drains, and streets or openly burnt contribute to pollution, flood and health risks.



## Air pollution

Air pollution exceeds WHO standards. Dust, residential use, and transport emissions are the three key activities attributing to the degradation of air quality in Addis.



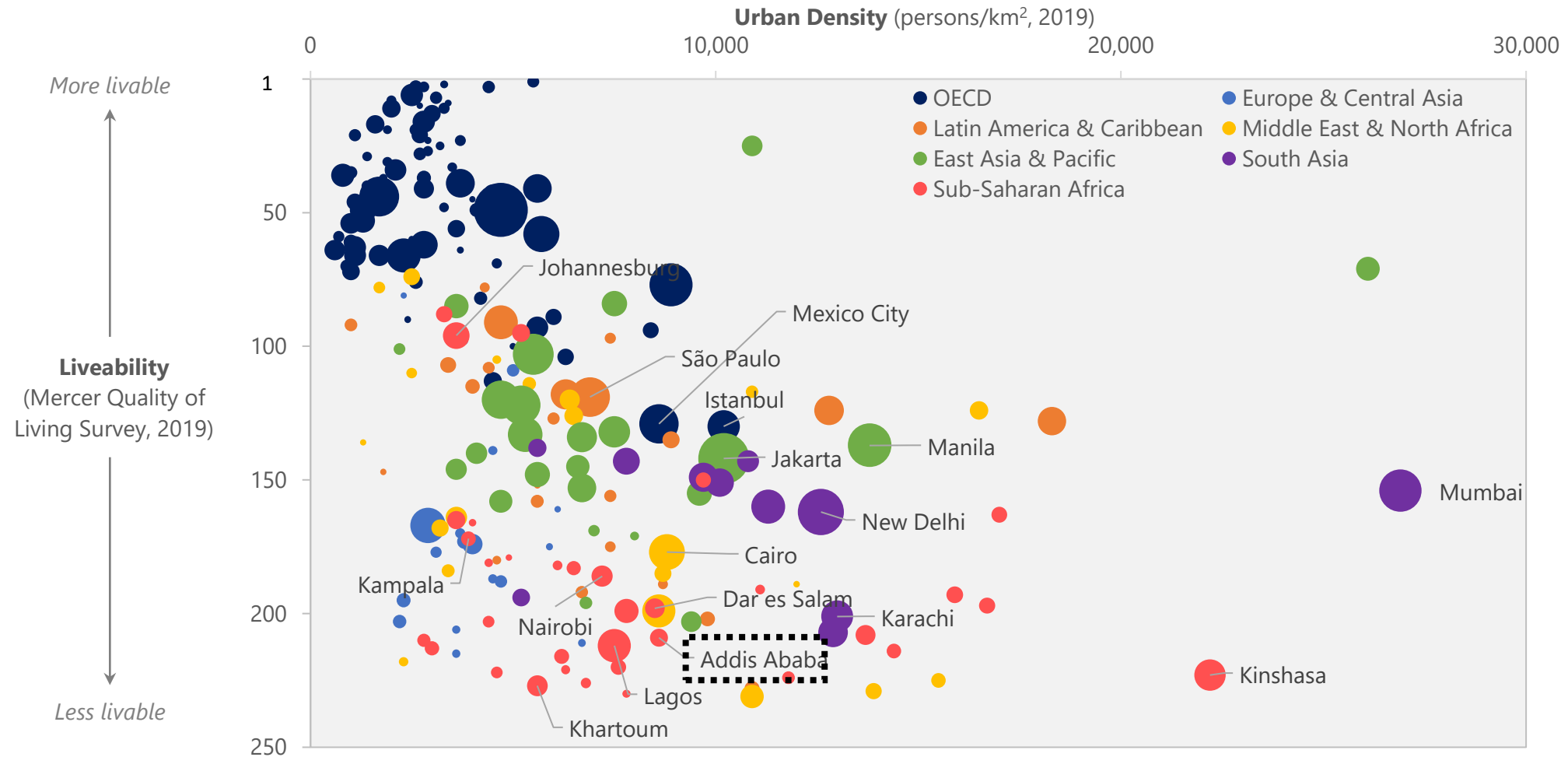
## Social services

Public hospitals are overcrowded, understaffed, and without enough medical equipment; social protection programs have low coverage and are fragmented.

# Livability

Addis is doing poorly in most indicators of livability and services

# Addis ranks 209<sup>th</sup> out of 231 cities according to the quality of living survey



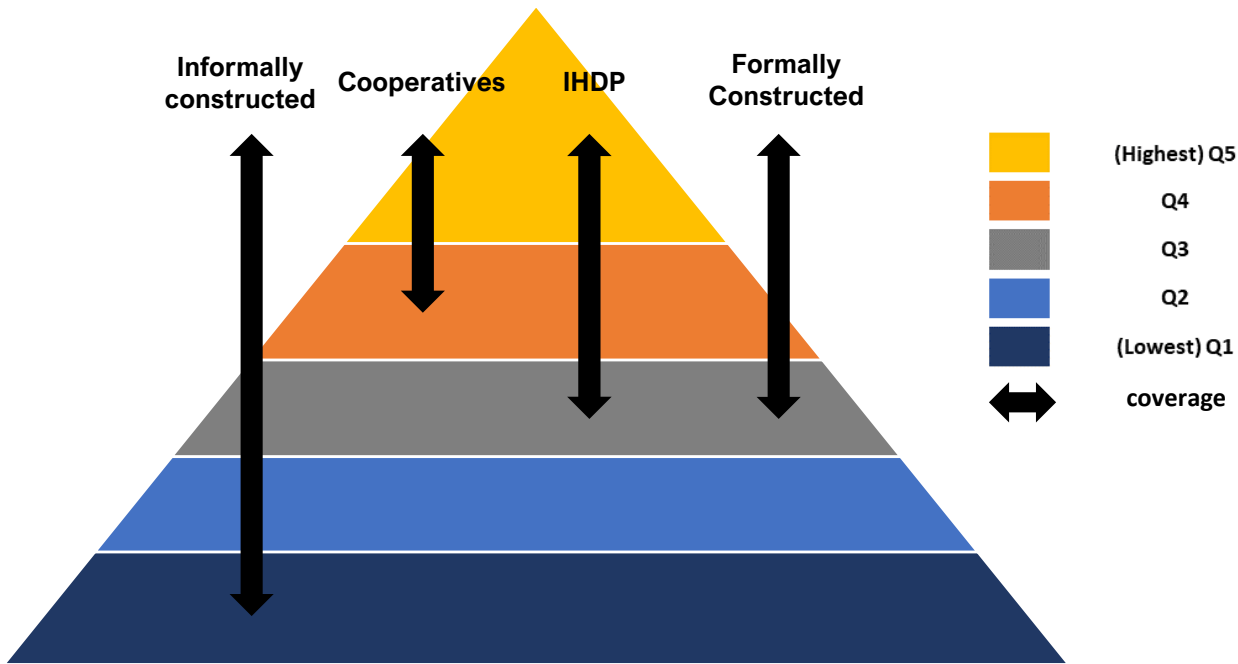
Source: Mercer- Quality of living survey (2019)

Note: Mercer's Quality of Living survey provides quantitative values for such qualitative perceptions to establish effective, objective assessments of city-specific quality of living measures around the world, by capturing aspects of daily living personal safety and security, health, transport infrastructure, availability of consumer goods, and adequate housing, schooling, and recreation opportunities.

(<https://mobilityexchange.mercer.com/insights/article/measuring-expatriate-quality-of-living>)

# Housing has serious supply, quality, affordability, service gaps

Housing Typology by household consumption quintile (Illustrative)



\*Size of each pyramid section represents an equal proportion of households

\*\*Arrows extend to the point where the proportion of households by housing typology per quintile exceeds 15%

## Supply<sup>1</sup>

- **Government:** supply of formal housing through IHDP (207,000 units during 2004-2019), unable to meet demands
- **Private sector supply:** limited to high-end market
- **Self-built and informally built housing** still dominates the housing stock
- The **rental housing market** is large, with many secondary dwellings or extensions on existing plots filling the supply gap

## Quality

- The majority of new housing units in Addis are low-quality rentals
- 78% of housing stocks are built with not durable materials

## Affordability

- Formal market is unaffordable for the bottom 40%

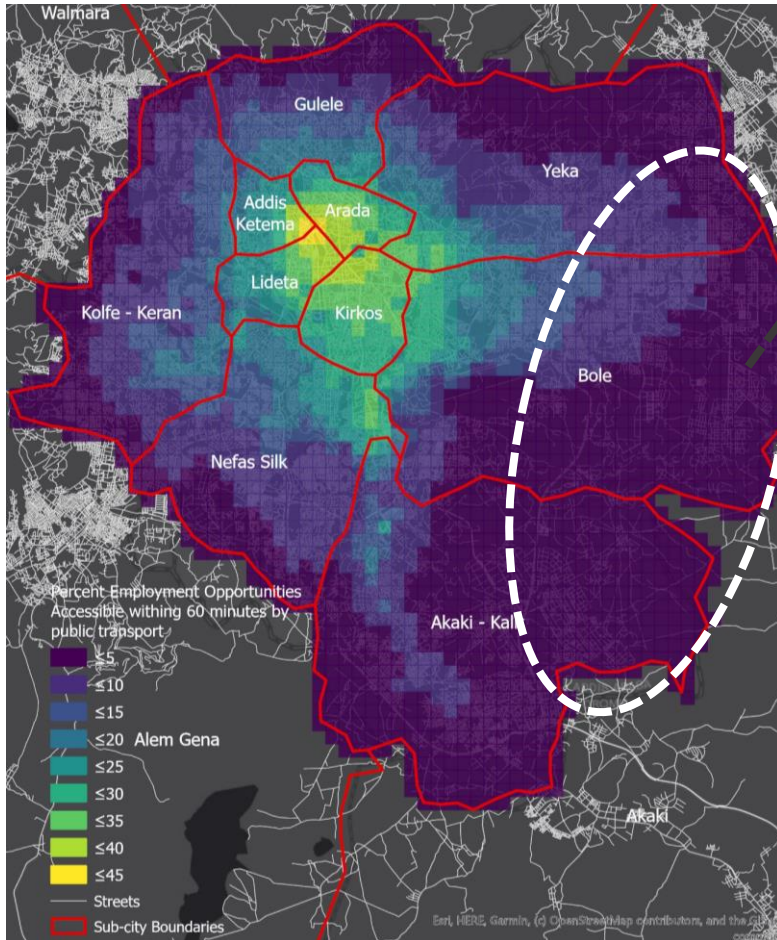
## Services

- The majority of IHDP are not connected nor serviced
- Inadequate infra and services in informal housing

<sup>1</sup> No data available for the supply of housing

# High traffic congestion, low urban mobility and accessibility

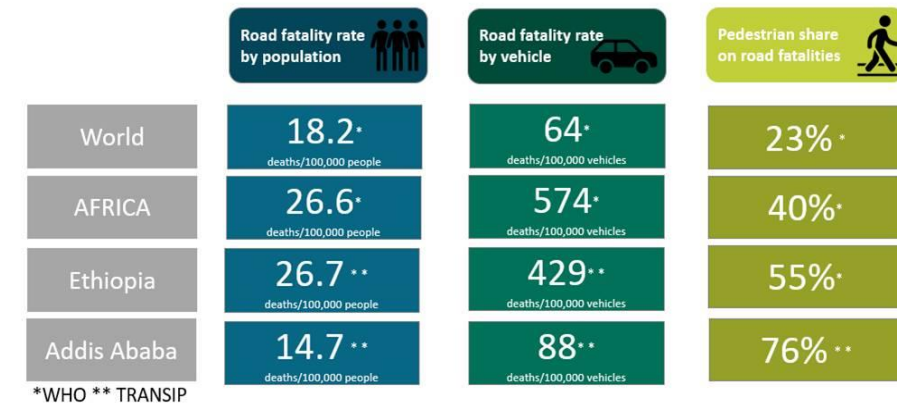
– disconnected and fragmented city with spatial mismatch of jobs & housing and lagging public transport service



- Transit services operate at low speeds and frequencies
- New, densely populated areas in the East have the poorest accessibility

Transport Accessibility KPI	
Public transport - average % of all jobs accessible 60 mins – Peak/Off-peak	<b>17.1%</b> /15.2%
Walking only – average % of all jobs accessible, 60 mins	<b>14.9%</b>
Driving – average % of all jobs accessible, 60 mins	<b>89.6%</b>
CBD Access – % of city population within 60 minutes travel via public transport	<b>49%</b>

## Pedestrian share of Road Fatalities

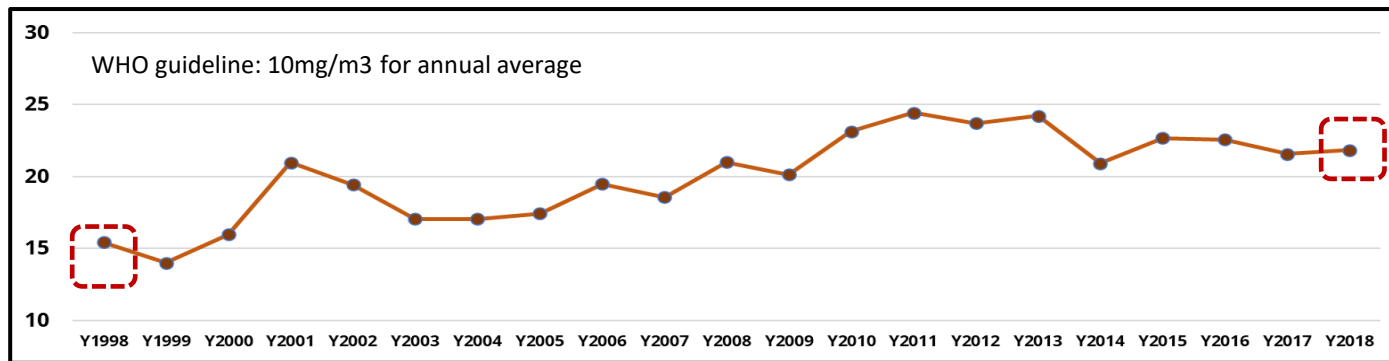
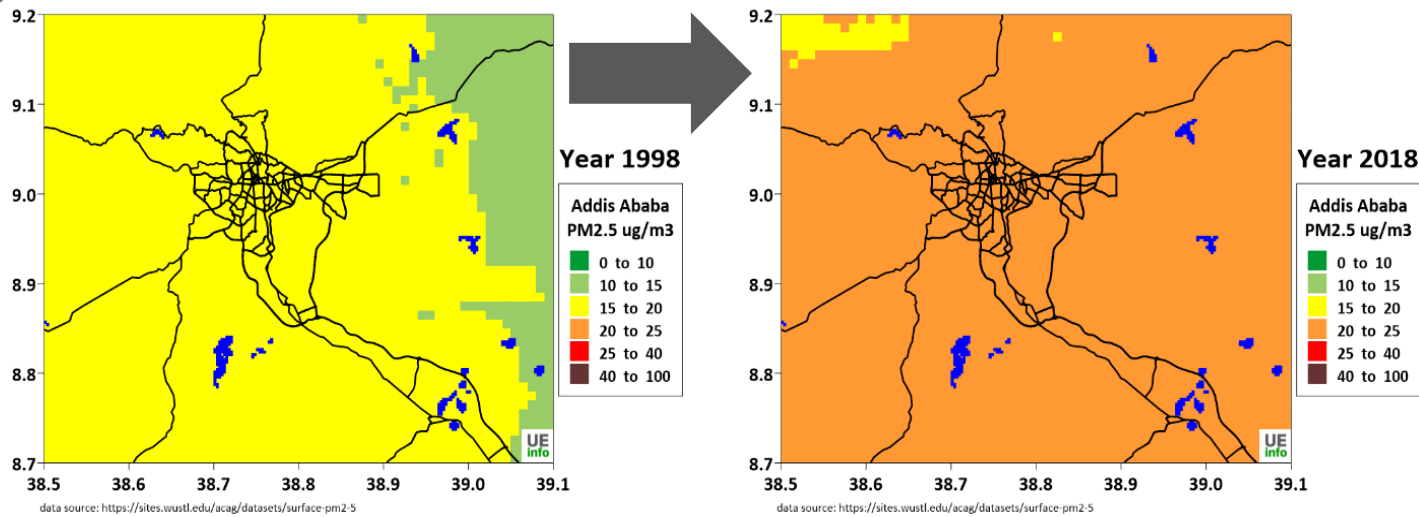


Source: WHO, AACATB, WB Transport Accessibility Study conducted as part of the ASA by the Transport sector after 1<sup>st</sup> phase diagnostics

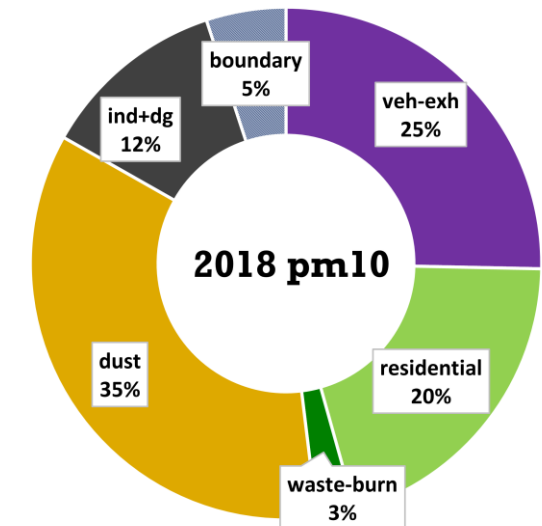
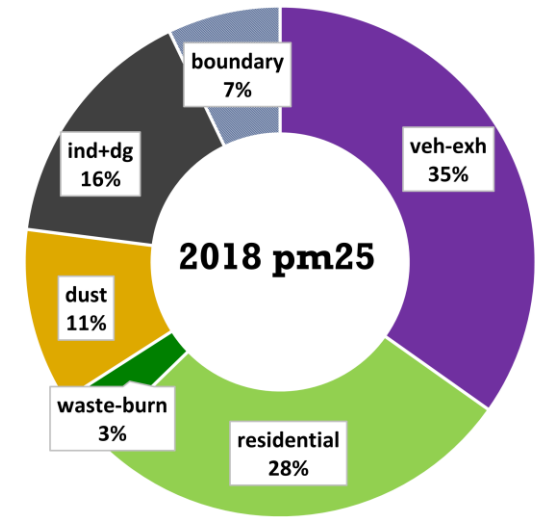
Notes: Walking accessibility assumed a walking speed of 5kmph. At 3kmph which is typical in urban setting, walking accessibility would be lowered to 10-11%. Driving is assumed at 20kmph

# Worsening air pollution with increasing dusts, transport emissions and domestic fuel consumption and burning practices

<PM<sub>2.5</sub> concentrations increased in the last 20 years>



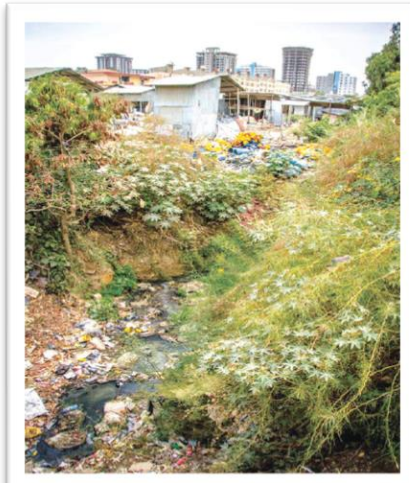
<Key attributors of PM<sub>2.5</sub> & PM<sub>10</sub>>



Source: Preliminary findings from Addis Air Quality Management ASA: PM<sub>2.5</sub> is considered the most relevant indicator for urban air quality. It can pass the barriers of the lungs to enter the blood stream, and destroy the integrity of the blood-brain barrier, thus causing premature mortality respiratory, cardiovascular, and neurological diseases. Veh-exh: vehicle exhausts.

# Sustainability

Addis' environmental quality has deteriorated and becomes vulnerable to climate change



## Water security

- Inadequate water availability far less than demand
- Pollution from wastewater, solid waste and industrial contaminants poses risks to sustainable growth

## Disasters & hazards

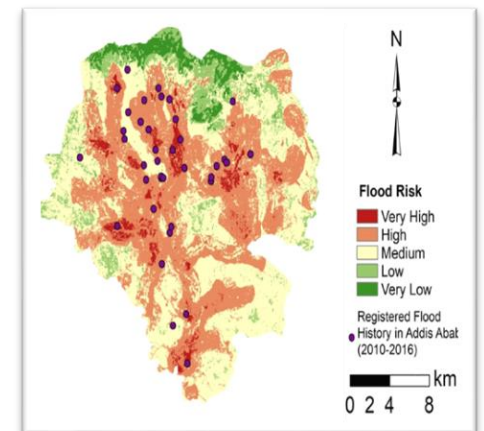
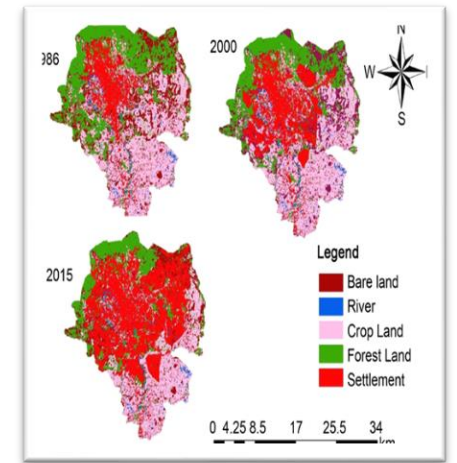
- Flooding, landslides, heat stress
- Disaster risks increasing due to degrading environmental quality and climate change impact

## Environmental & ecological quality

- Forest land loss: 8,310 ha between 1986-2015 (21% → 5% of total area)
- Degrading ecosystem weakens Addis' resilience to stress and shocks

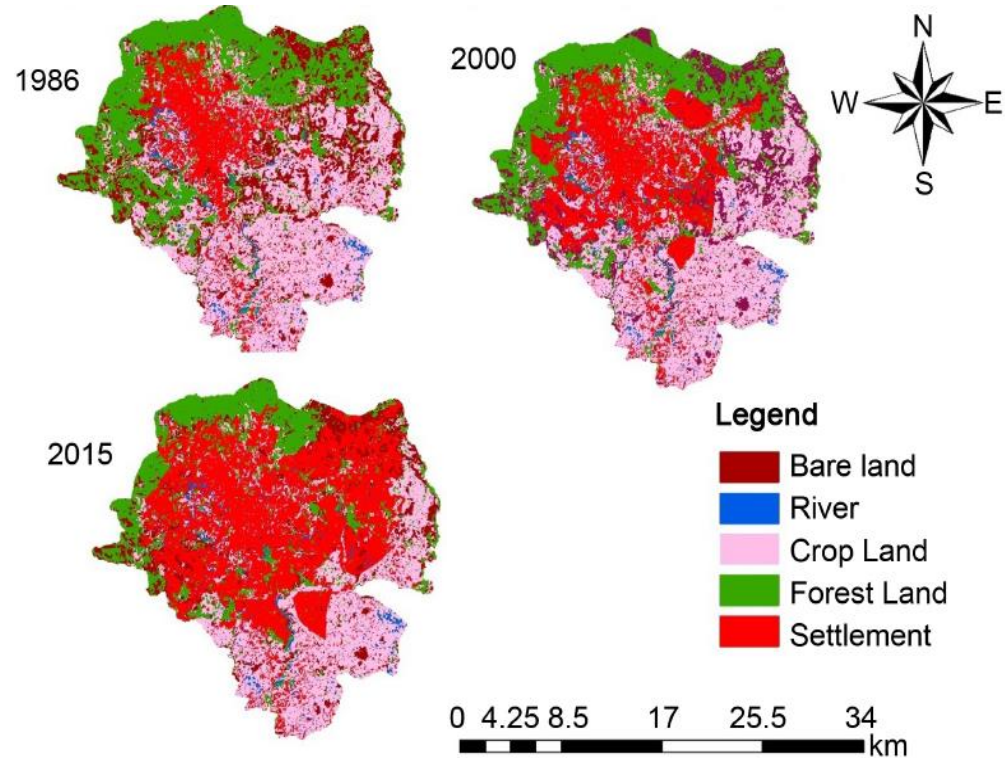
## Increasing Risks

- Population and urban growth increase exposure/vulnerability
- Climate change changes hazard potential

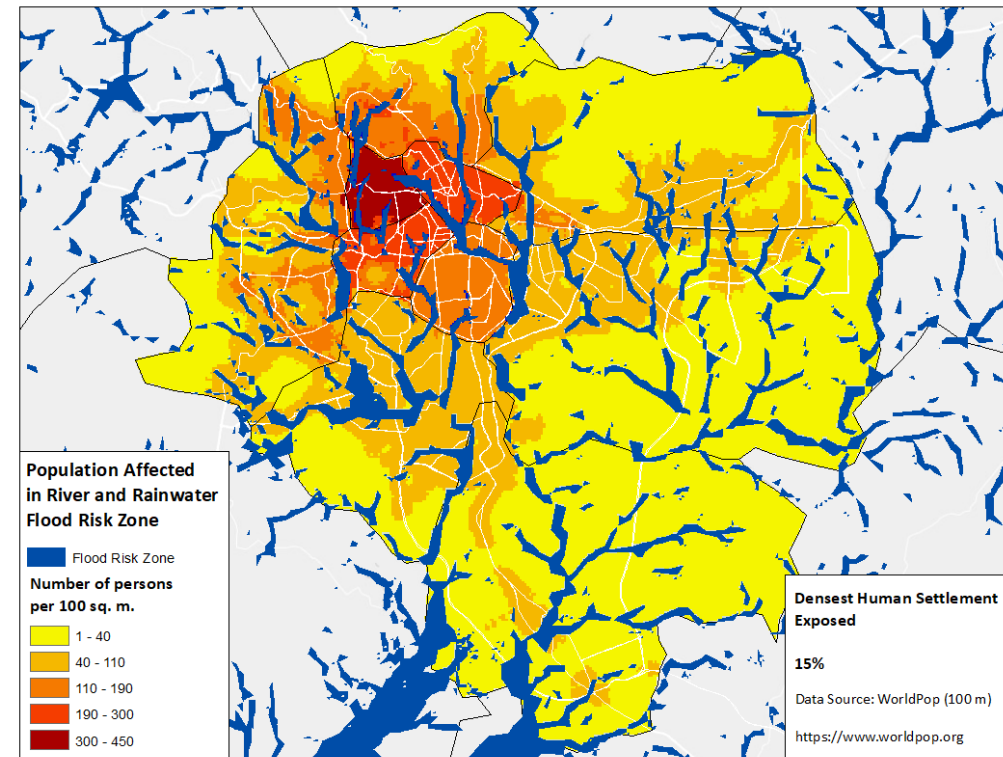


# Green space has decreased, disaster risk increased

<Green space landscape change from 1986 to 2015>



<Population affected in Flood Risk Zone>



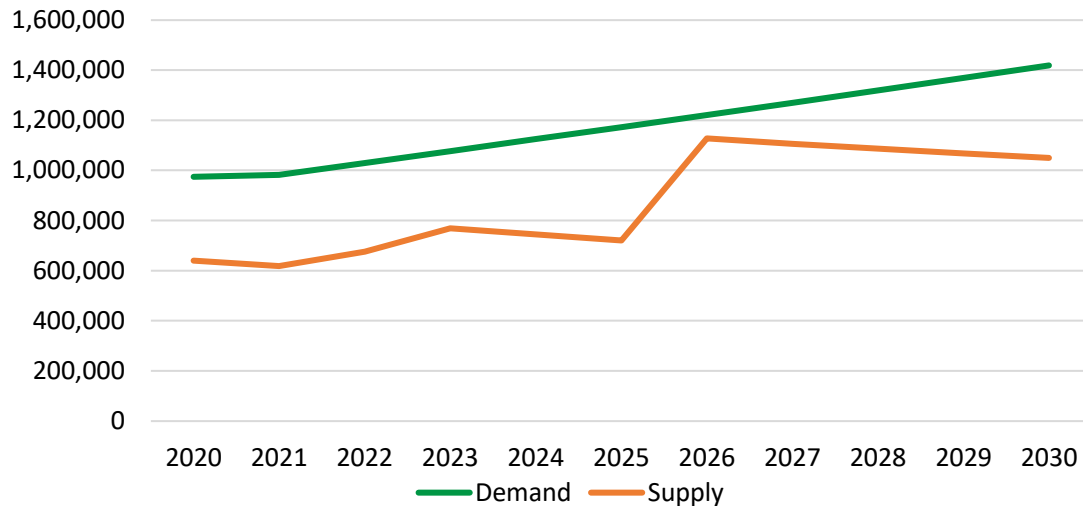
- **Forest change: 21% in 1986 → 5% in 2015<sup>1</sup>**
- **Lacked green spaces: 00.4 – 0.9 m<sup>2</sup>/capita (WHO recommended minimum: 9m<sup>2</sup>/capita)<sup>2</sup>**

## Climate change increases risks in urban flash flooding and landslides

- Localized flash flooding frequently occurs due to **inadequate drainage, poor road design, inappropriate SWM, encroachment**
- **Disappearance of green space responsible for 40% of the flooding and landslides in the city<sup>2</sup>**

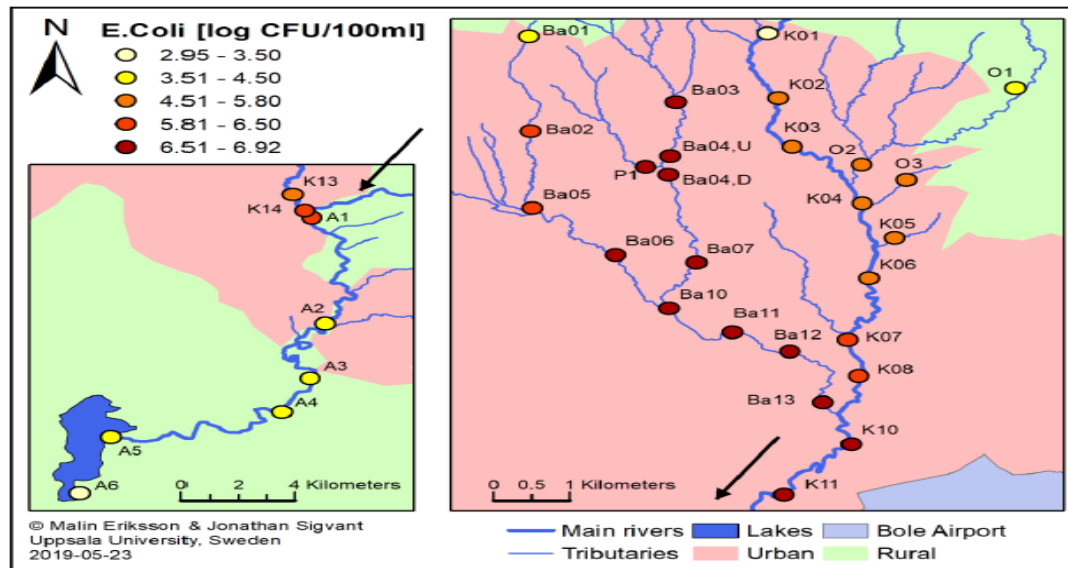
# Water security is at risk and exacerbated by pollution

Projected demand and supply balance



## Water insecurity

- Demand and supply: **not meeting the current and projected demand**
- Lower water production than capacity and frequent water cuts due to **power outages and aging infrastructure**
- Frequency: **19 woredas getting water once a week**



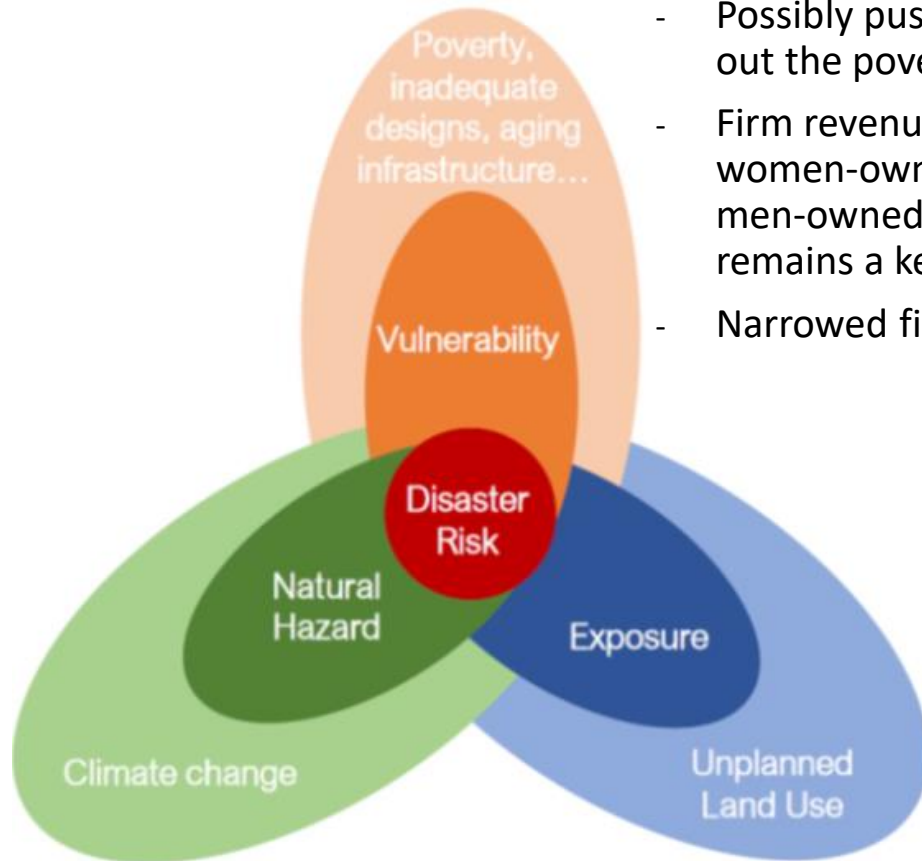
## Water contamination

- **High surface water contamination** in both Kebena and Akaki river, throughout the city, **mostly from domestic, municipality and industrial wastewater and solid waste** – due to the lack of sewerage and sludge collection and treatment
- **Fecal contamination:** with only 29% of the city connected to the sewage system, human feces end up in the river

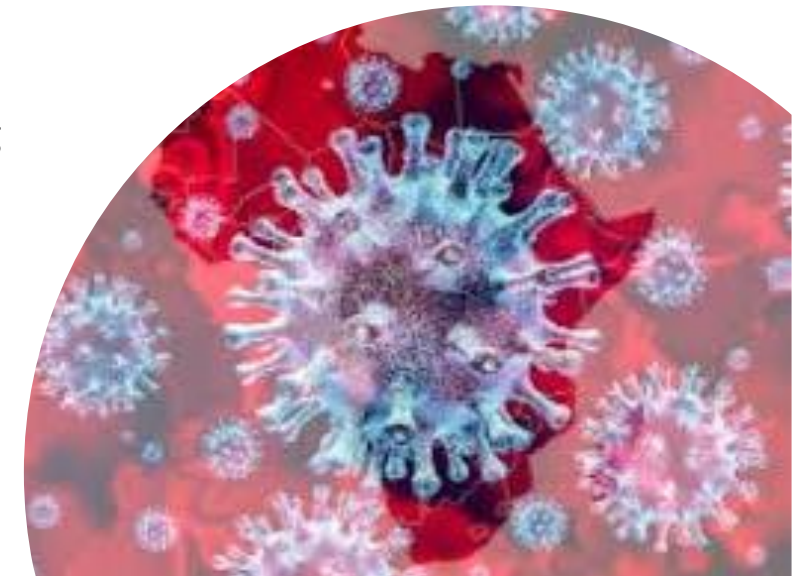
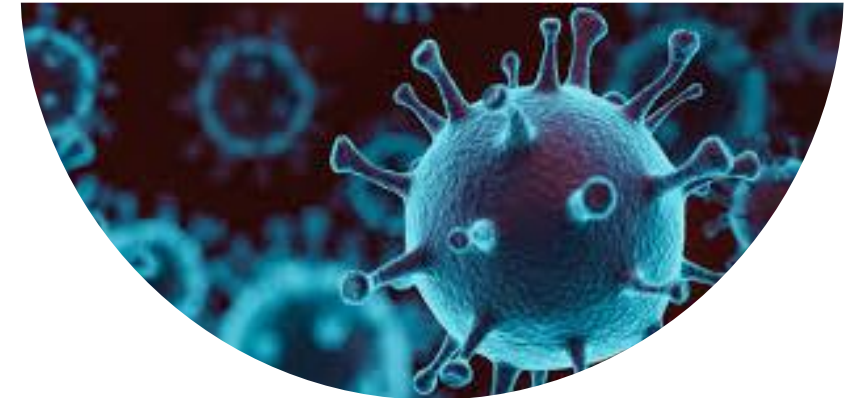


# COVID-19 has exposed the city's weaknesses in city services and management : Time to re-think the city development approach

- COVID-19 causes severe impacts on lives, livelihoods, economy, finance
  - Possibly pushing the poverty rate by 6%, cancelling out the poverty reduction gains since 2011
  - Firm revenue/household income depressed, women-owned business twice more affected by men-owned. While recovering, vulnerability remains a key concern
  - Narrowed fiscal space



- Continuing mitigation measures targeting to reduce exposure and vulnerability
- Need for **more resilient and inclusive urban planning** considering the density matching with social and physical infrastructure, open space, resource management
- Strengthening spatial data infrastructure and digital platform



- **Youth (14-29) population share 44%** exceeds regional average of 31%, female youth (60%) of total youth population

- **Youth & female unemployment** rates remains high -28% & 24%

- 1/3 of the employed suffer from **underemployment**

## ECONOMIC

- **Spatial mismatch** between jobs, housing, and services for worse-offs

- **Gentrification and displacement** concerns

- **Limited access and affordability** to housing and public spaces

- Design of public space and infrastructure lacks inclusion

## SPATIAL

- **Low access** to basic infrastructure & services: water, sanitation, transport, electricity, health, education

- **Limited and disadvantaged mobility** for pedestrians

- **Congestion, pollution, climate disasters** disproportionately affect the vulnerable

## SERVICES

- **Lack of sustainable public participation** and stakeholder engagement in urban planning, land use, urban design, infrastructure development & implementation

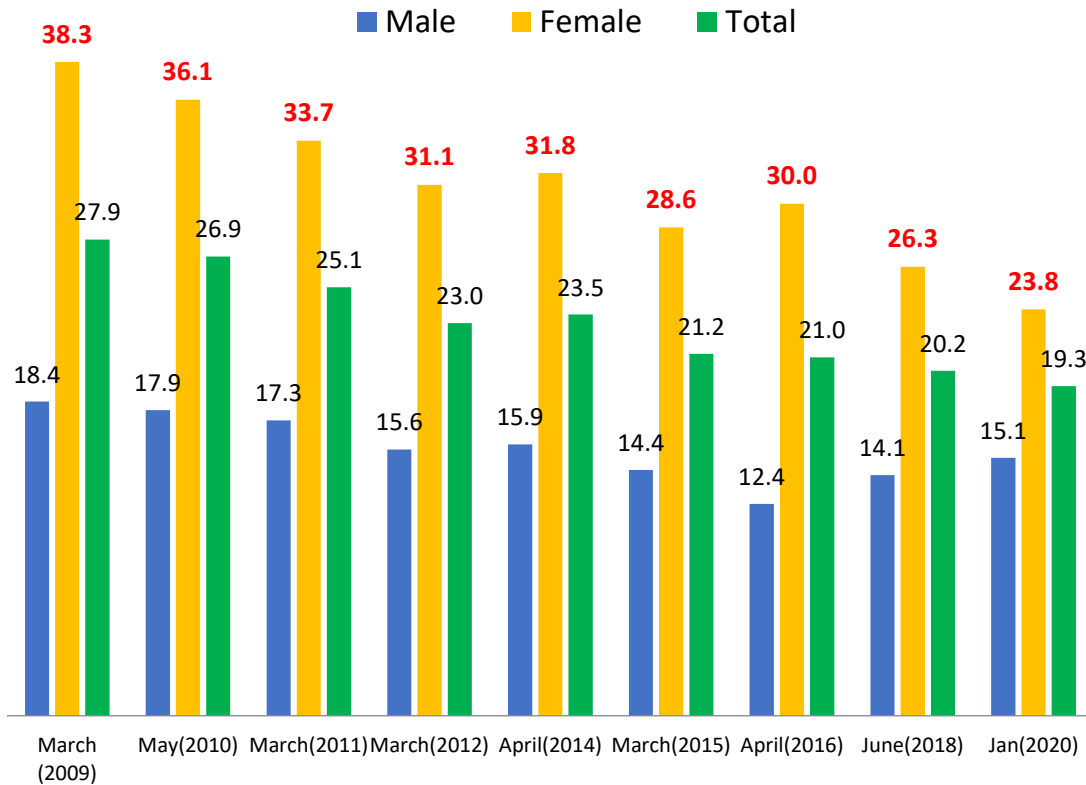
## CITIZEN ENGAGEMENT

# Inclusivity

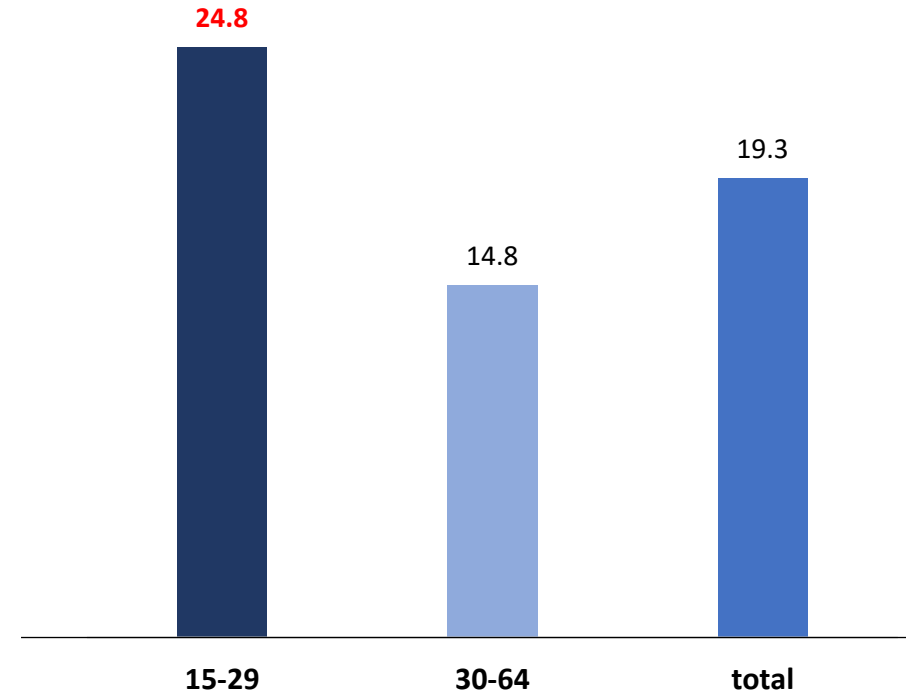
Addis needs to become more inclusive in socio-economic opportunities, services provision, and citizen engagement

# While overall unemployment has dropped in the past decade, youth and female unemployment rate is still high

Addis Ababa unemployment rate (%)



Unemployment rate in Addis, 2020 (youth vs adult)



# Access to basic services remains precarious to the urban poor and the current social protection programs have low coverage

- **Disadvantaged access by the urban poor to basic services and mobility:**
  - ✓ Uneven provision of basic urban services such as water, sanitation, electricity, transport services across the city
  - ✓ Mobility challenges to pedestrians and public transport users
- **Limited social protection programs:**
  - ✓ Influx of migrants to Addis Ababa
  - ✓ Low coverage and fragmented current social protection program (several on-going social protection programs but not coordinated)
  - ✓ Lack of appropriate data and management information system

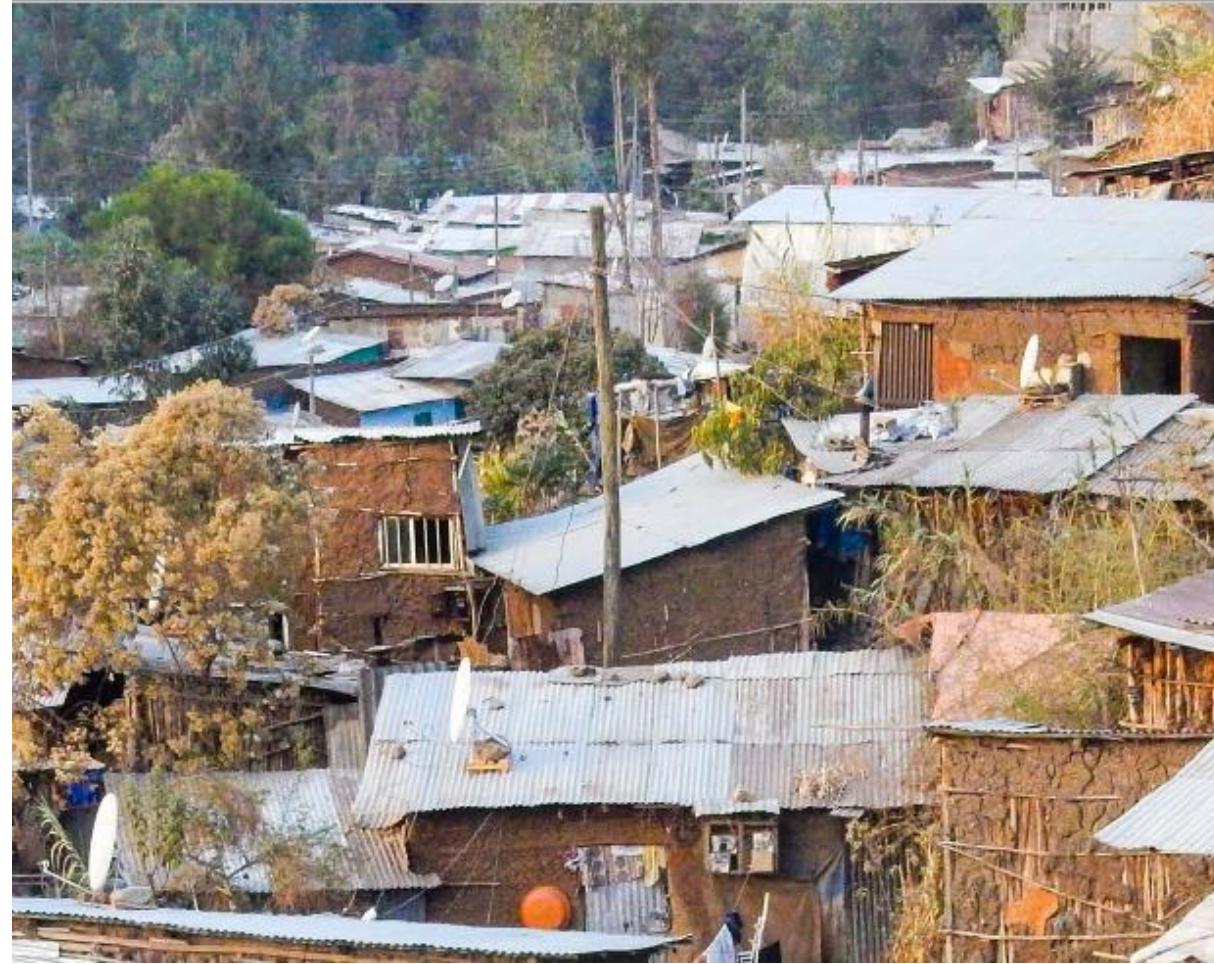


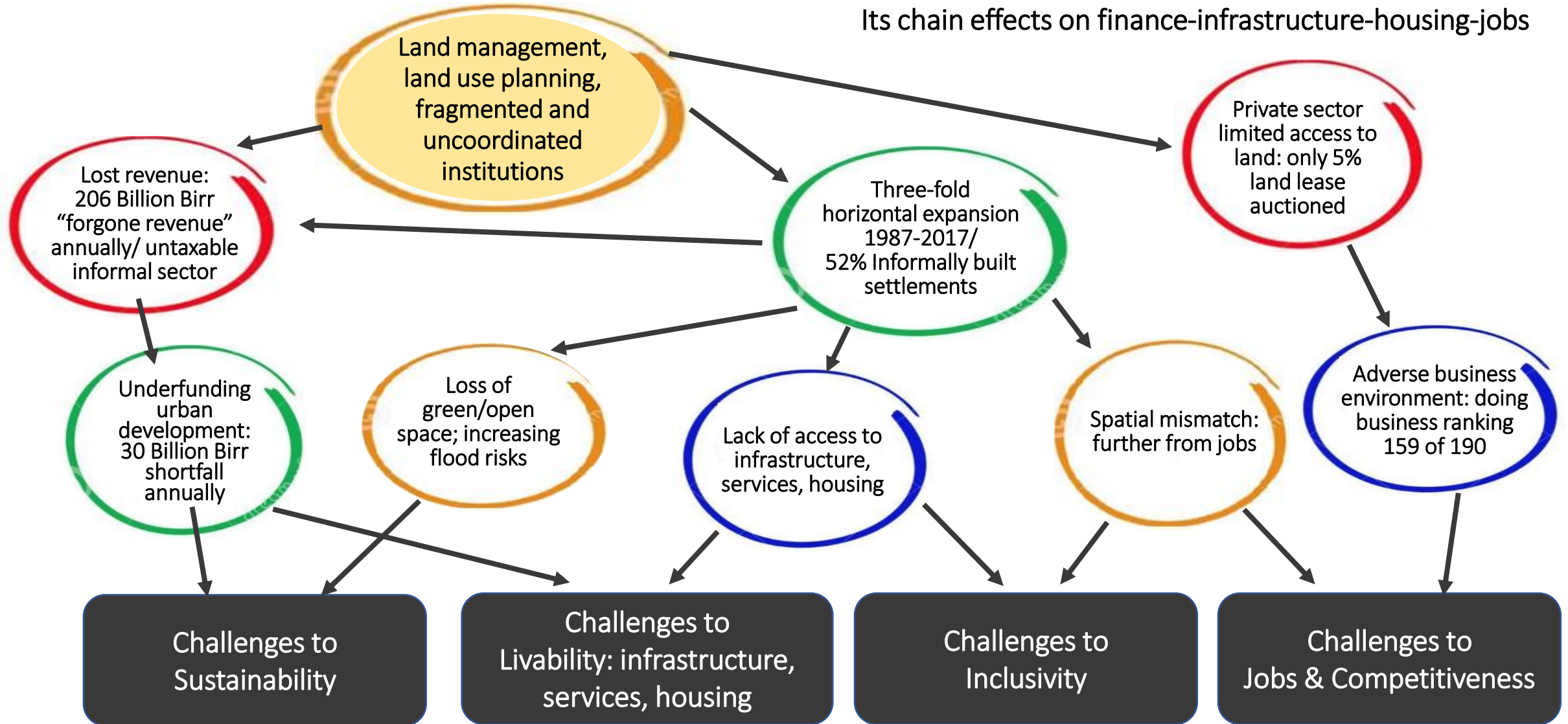
Photo: World Bank (2015a)



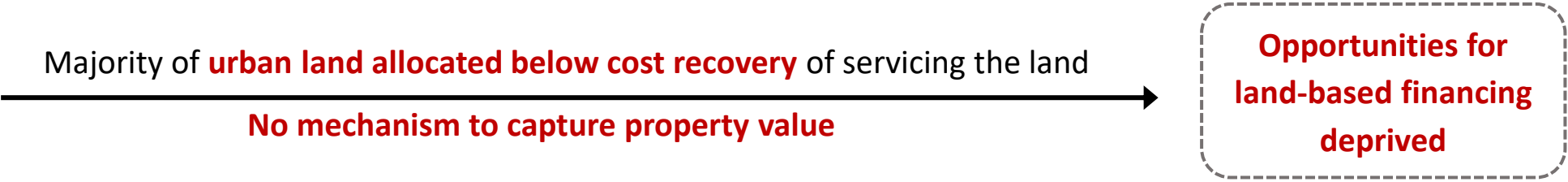
**Root Causes:**

**III. Key binding constraints to be addressed**

# Poor land management & planning and uncoordinated institutions are key binding constraints for Addis Ababa



# Financially not sustainable and insufficient land management becomes a significant cross-cutting constraint for city development



<Land production cost vs. Supply price (2013-2017)>



<Land needs and formal land production>

	Addis Ababa	Low growth	High growth
<b>Land needs</b>		3,150 ha/a	4,150 ha/a
<b>Average annual production (2012/13-2016/17)</b>		1,446 ha. (46%)	1,446 ha. (35%)

- **Formal land production slow, overly complex**
  - Only 5% land auctioned; Vacant or underused land in prime locations; Hand over without services
  - Rural to urban conversion (major source) leading tension
  - Constrained regularization due to rigid regulation
- **Active informal land development, particularly in peri-urban areas**

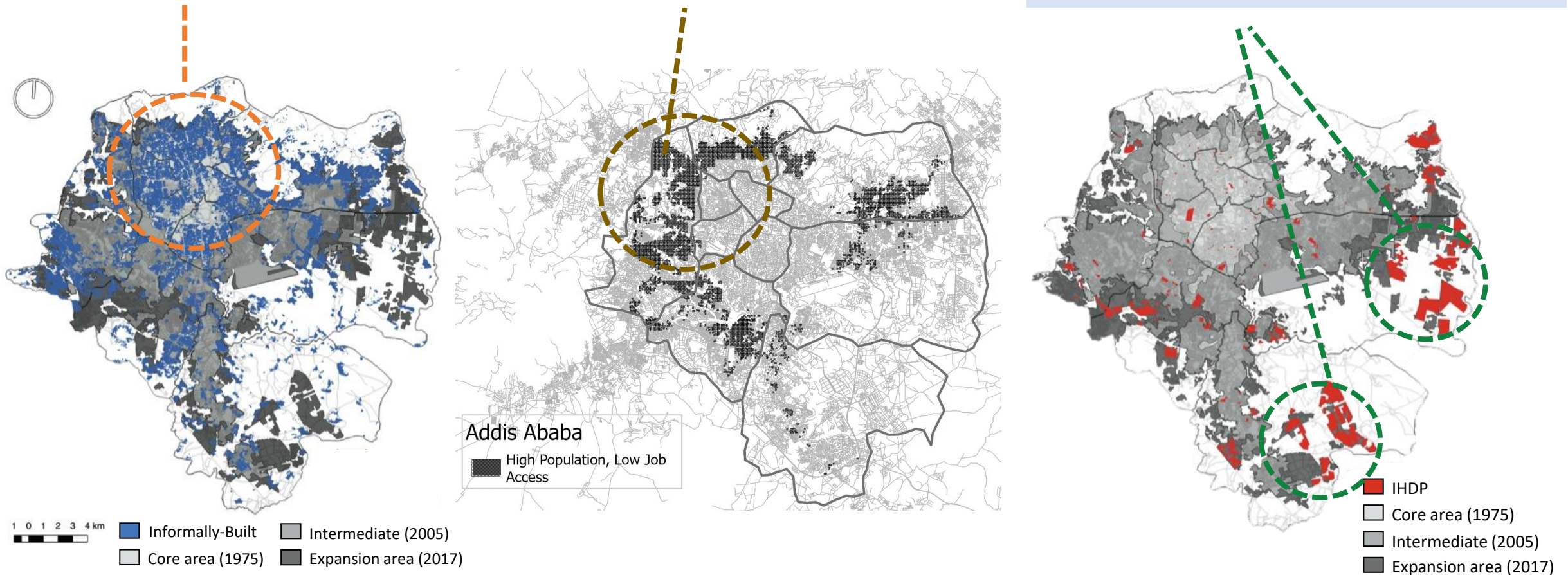
Source: World Bank (2019d)

# Addis expansion in the absence of integrated planning and development control leads to low livability with low-quality housing, dysconnectivity, and inaccessibility

Informal settlements, often trade-off housing quality for access to job

Crowded neighborhoods near CBD without adequate transportation system

IHDPs in recent expansion areas on the edge of the city have limited connectivity and services





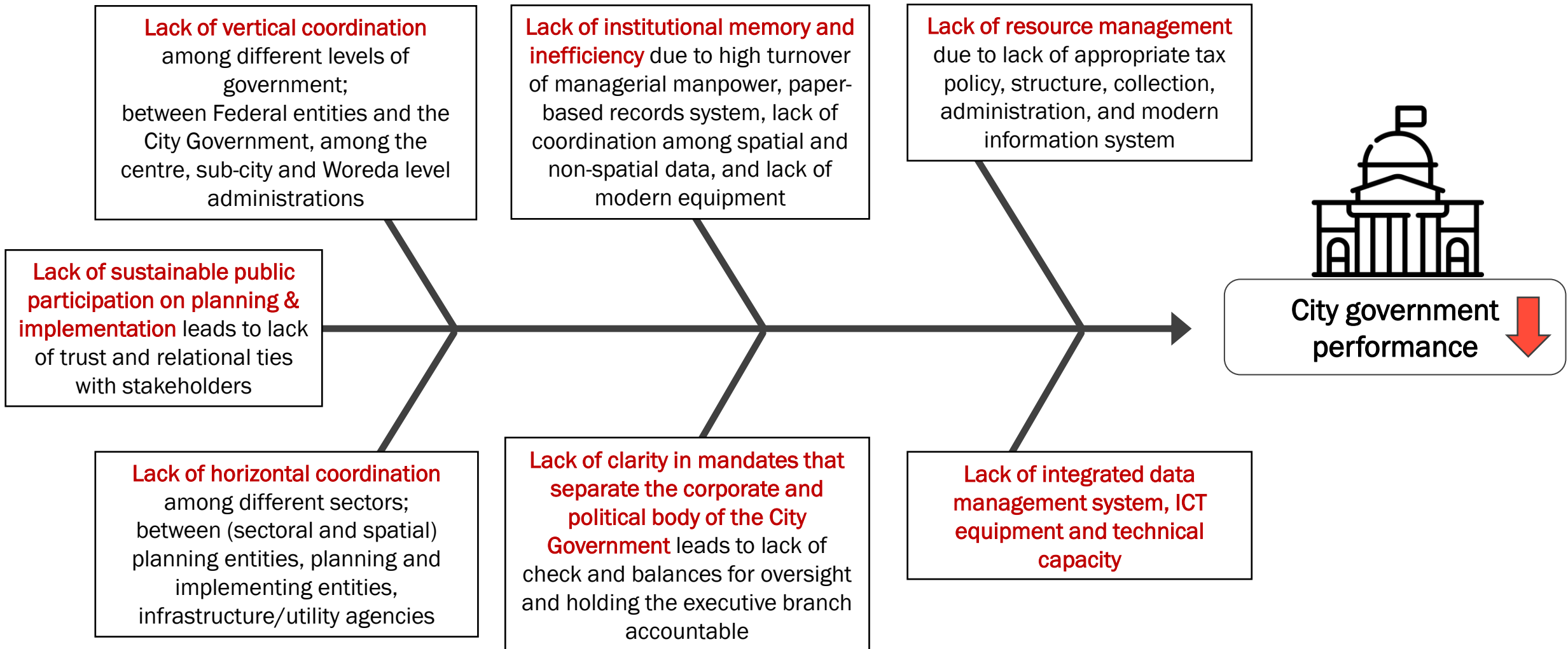
# Municipal finance is far from meeting development needs: much more public and private investment is needed to close the infrastructure, service and housing gaps

- **Development needs at 881 billion birr for 10 years :**
  - Federal: 49 Billion birr (6%)
  - City: 453 Billion birr (51%) – **average 45 Billion birr pa**
  - Private Sector: 379 Billion birr (43%)
- **Capital expenditure** amounts to **15.5 Billion birr** in 2018, representing **9% of the city's GDP**
- **Own source municipality revenue** represents only **1.5% of the city's GDP**
- Needs for strengthening own source municipality revenue generation and **engagement of private sectors** for municipal services

Further, **capital investment needs to be strategically planned and budgeted**, moving away from fragmented and sector-specific investments to **spatially integrated and connected investments**

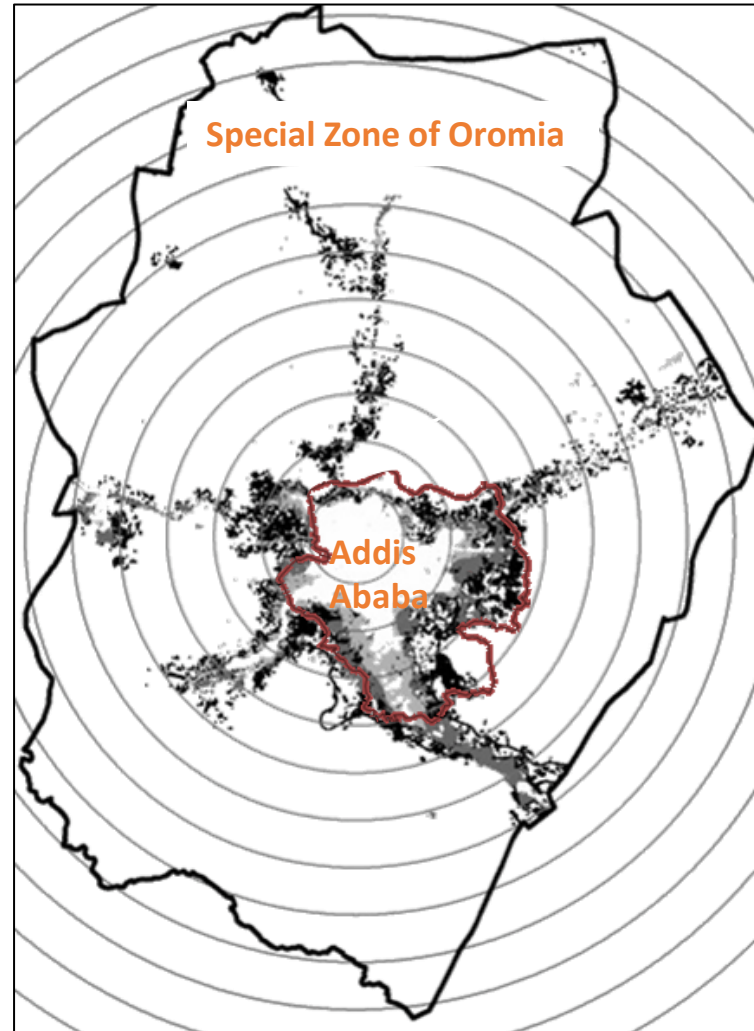
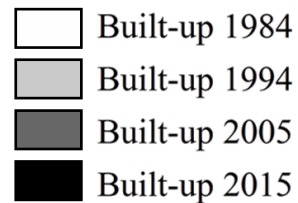
Indicators	2016	2017	2018
	%of GDP	%of GDP	%of GDP
<b>Total Revenue</b>	<b>18.49</b>	<b>18.35</b>	<b>20.30</b>
Domestic Revenue	17.86	18.01	20.07
<b>Municipal Revenue</b>	<b>1.22</b>	<b>1.29</b>	<b>1.53</b>
Grant from Road fund	0.03	0.04	0.01
External Grants	0.02	0.01	0.01
External Loans	0.60	0.33	0.22
<b>Total Expenditure</b>	<b>15.46</b>	<b>17.19</b>	<b>18.22</b>
Recurrent Expenditure	7.42	8.12	9.40
<b>Capital Expenditure</b>	<b>8.04</b>	<b>9.07</b>	<b>8.81</b>
<b>Aggregate Surplus (Inc. Grants )</b>	<b>3.03</b>	<b>1.16</b>	<b>2.08</b>

# Challenges in coordination and resource management also inhibit the performance of city government

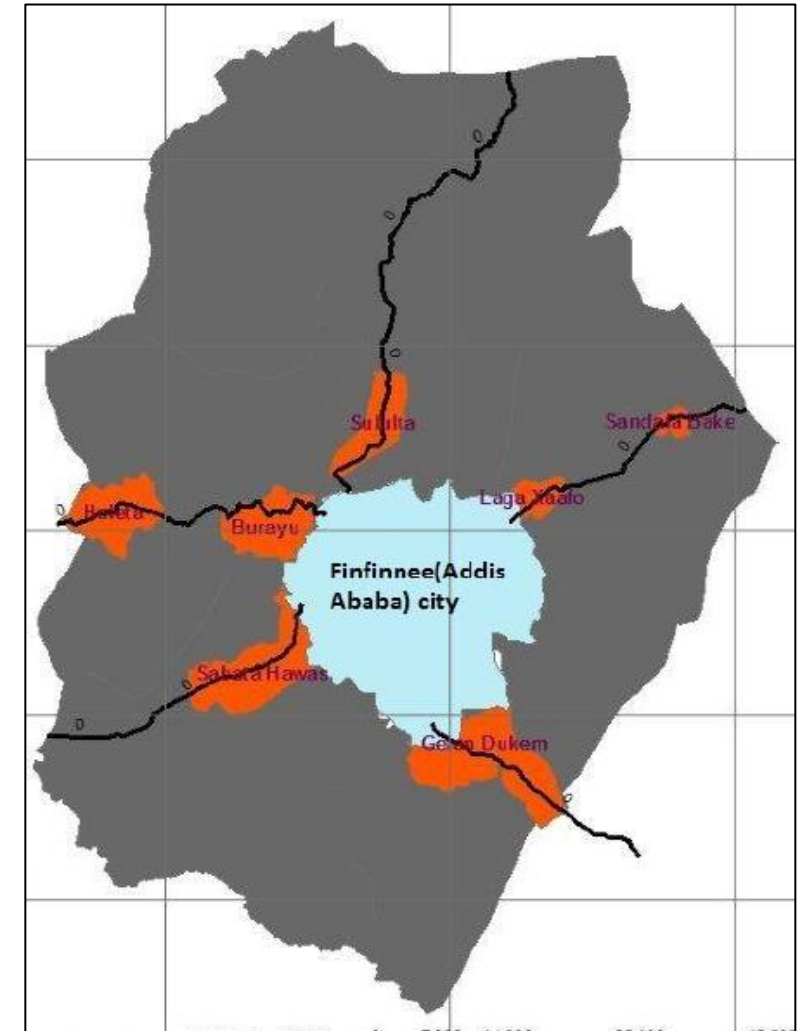


# Lack of coordination between administrations misses opportunities for synergistic growth for Addis Ababa and neighboring towns

- Addis Ababa is a home to the Addis Ababa City administration, the Federal government of Ethiopia, and Oromia regional government.
- High political interference on City's capital project selection (70%)
- **Need of fostering dynamic and synergistic relationship between Addis and neighboring towns**



Source: Mohamed & Worku (2019)



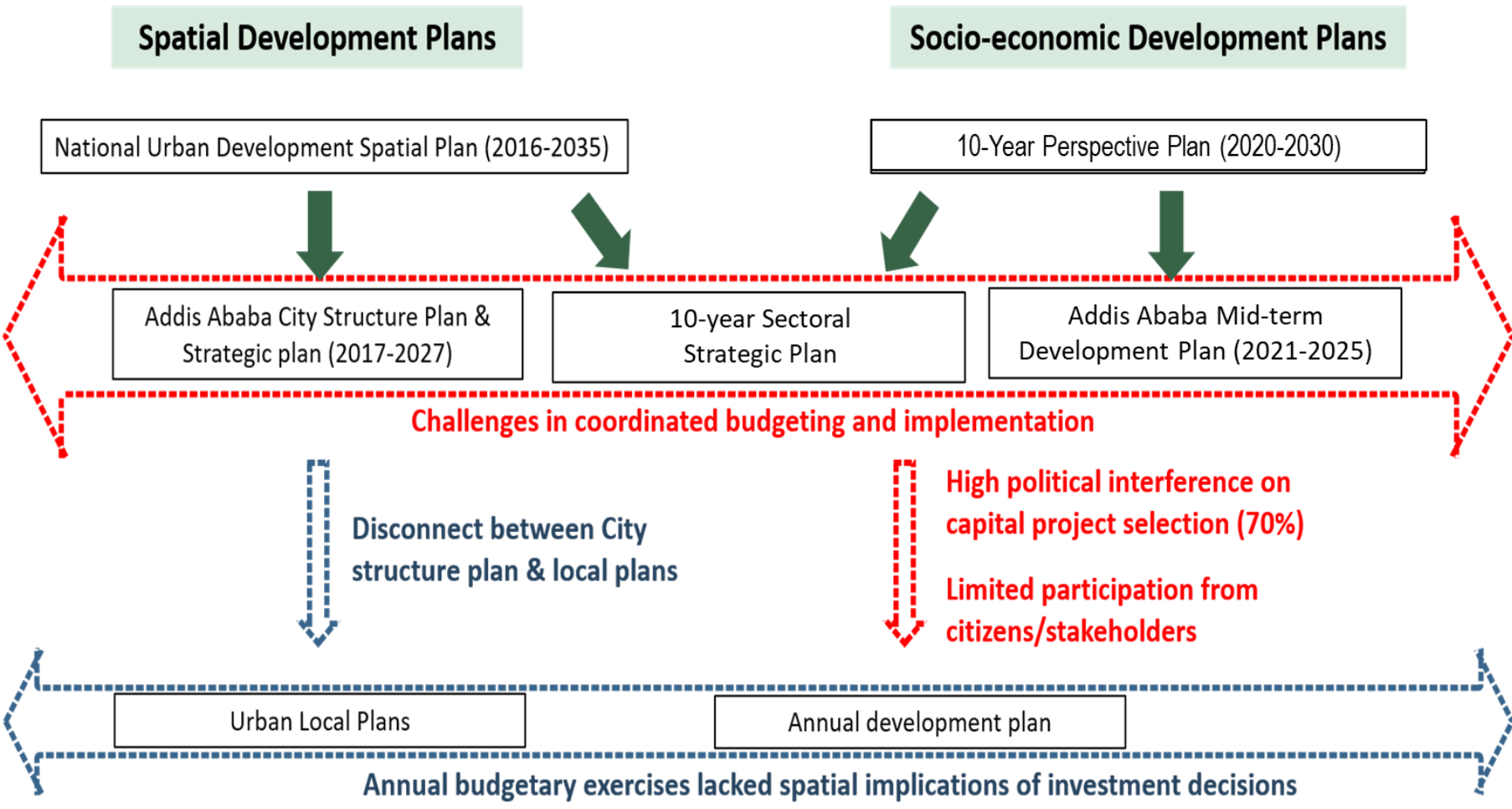
Source: Tabor (2019)



Ongoing efforts:

## **IV. Government of Ethiopia and DPs**

# Government development efforts are ongoing with strategic plans, but coordinated implementation is a challenge

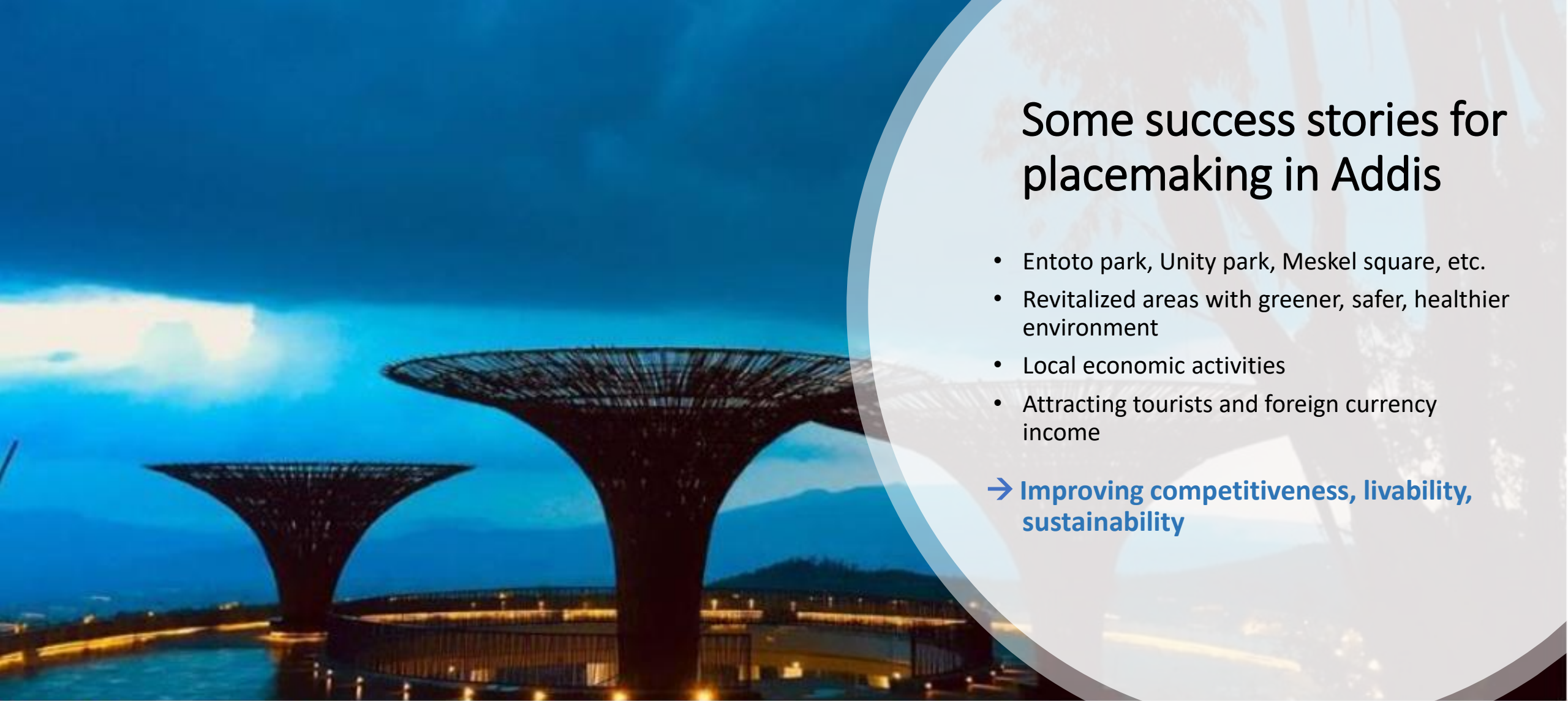


- ## Various past & on-going projects:
- Transport
  - Water
  - Social safety net
  - Meskel sq underground parking
  - Grand Palace parking
  - Piasa Adwa terminal
  - Sheger
  - Unity park
  - Arat Kilo library
  - Adey Abeba stadium
  - Seedling plantation
  - Public school feeding
  - Pottery center
  - Bread factory

# Some success stories for placemaking in Addis

- Entoto park, Unity park, Meskel square, etc.
- Revitalized areas with greener, safer, healthier environment
- Local economic activities
- Attracting tourists and foreign currency income

→ **Improving competitiveness, livability, sustainability**



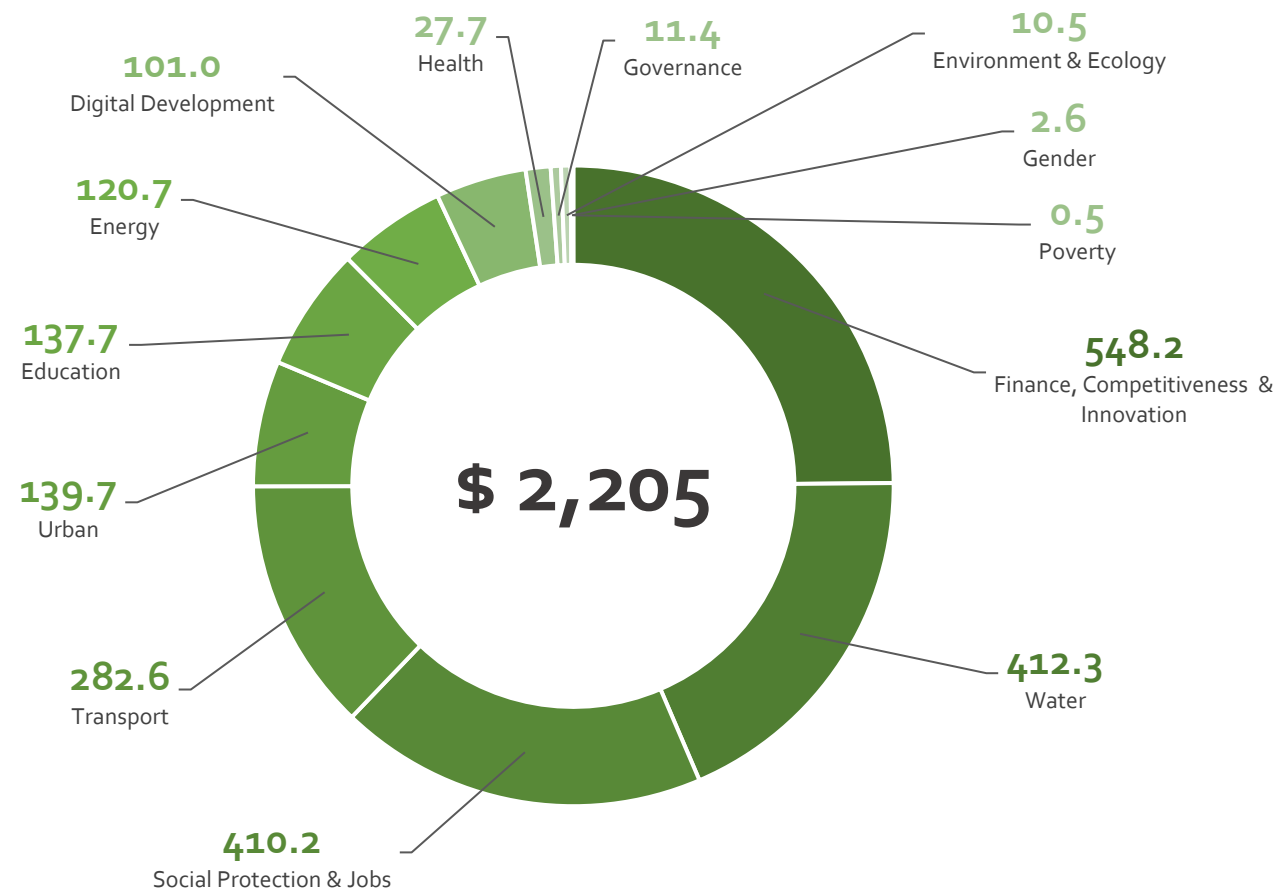
# Large amount of investment was made by development partners into boosting productivity and building key infrastructure in the last 5 years

## Way forward..

The DPs support need to:

- be better **coordinated and aligned** with city's key priorities
- help strengthen **city systems**
- improve **accountability** to citizens

Addis Ababa On-going/past Projects by WB and Major DPs (2015-) (USD mil)



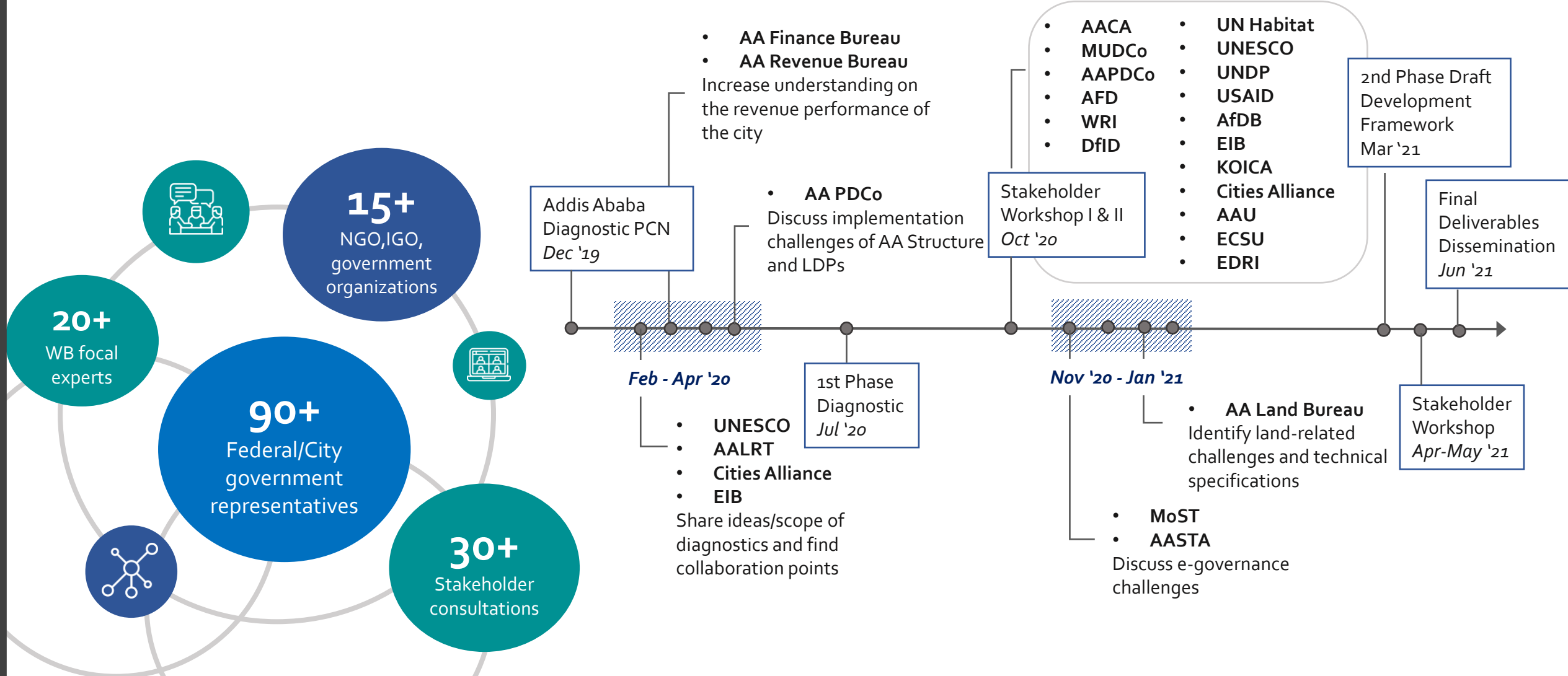


**Proposal:**

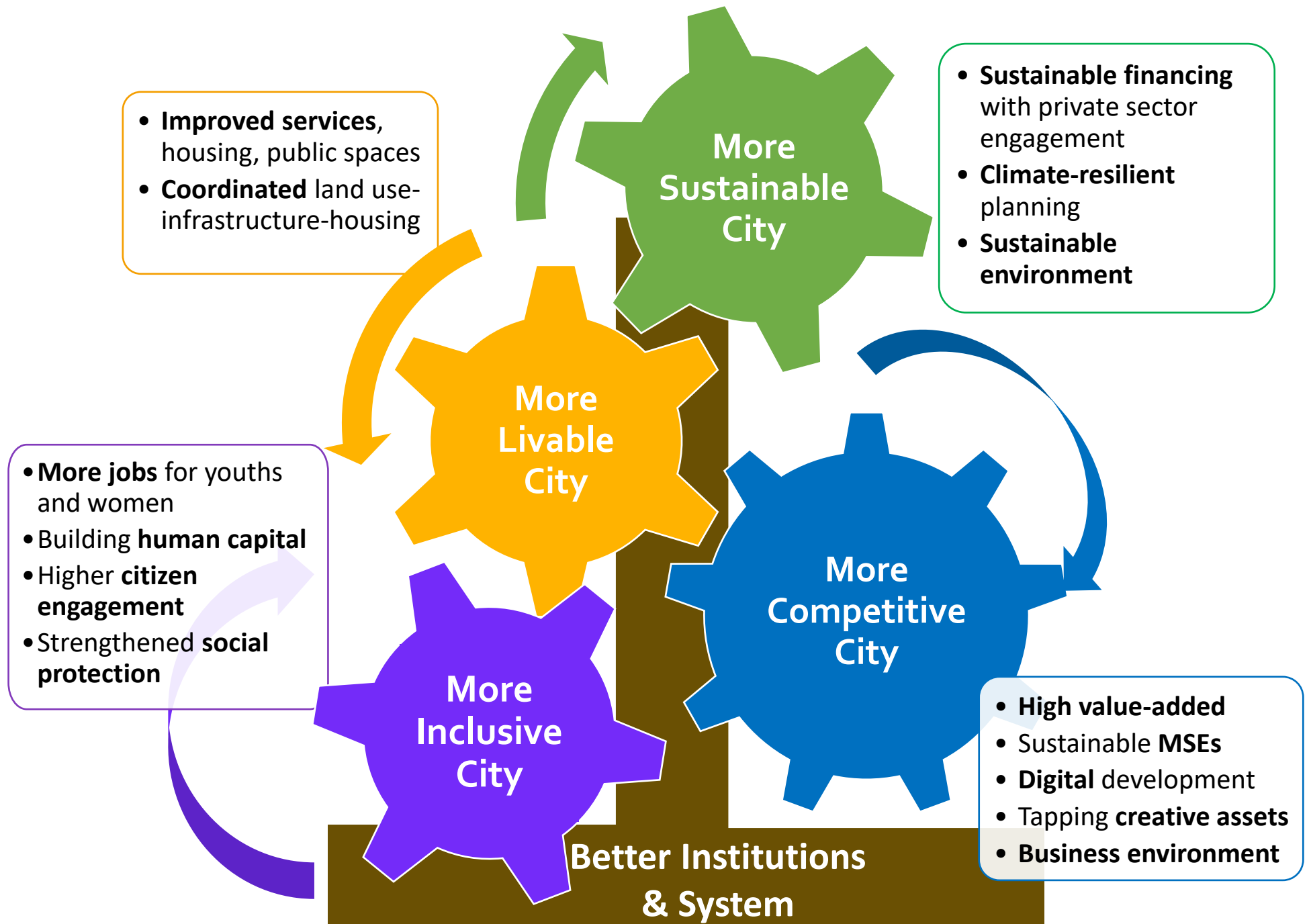
## **V. Addis Ababa Strategic Development Framework**



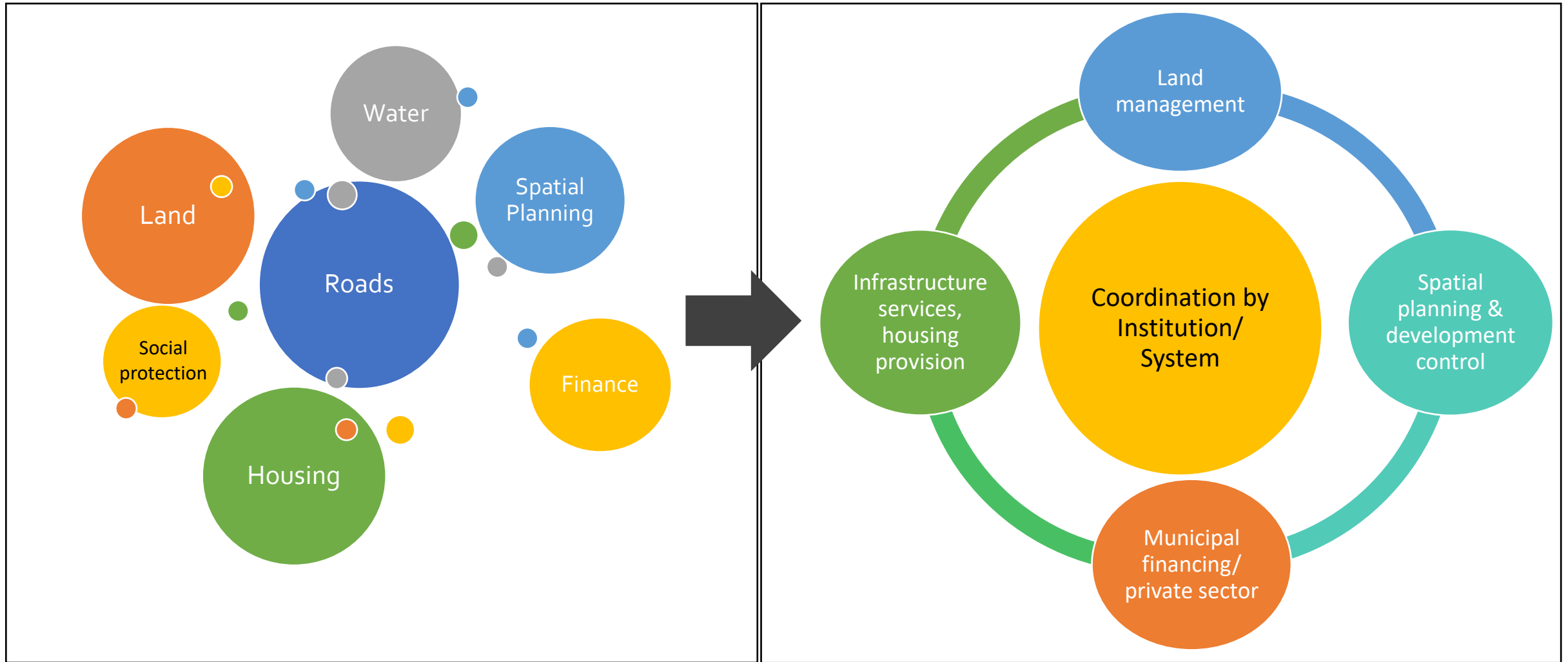
# The Framework was built through multiple stakeholder engagement processes, involving more than 100 key sector representatives and experts



# Toward more integrated and coordinated development

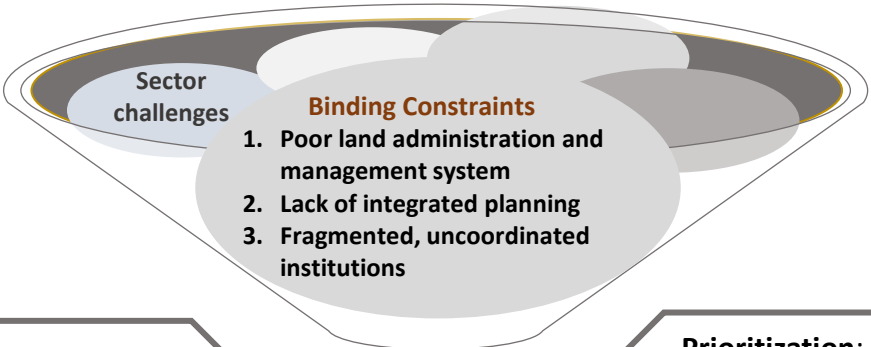


# A paradigm shift is required....



.....to enhance Institutional coordination/systems

# Addis Ababa Strategic Development Framework



Multi-sector Addis Ababa Diagnostics

Guiding Principles

**Government strategies and plans:**  
What are government strategies and related goals?



**Prioritization:**  
What are the quick wins & medium-term strategies to address the binding constraints?

Pathways



Fundamentals

1. Empower land markets and promote integrated planning
2. Foster interagency collaborative arrangements
3. Enhance sustainable municipal financing
4. Establish city data governance and management, leveraging digital technology

Objectives under each Pathway

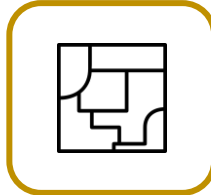
- |   |  |  |  |
|---|--|--|--|
| 5. Enhance an enabling business/investment environment                                      | 8. Enable housing market and upgrade informal settlement   | 12. Improve environmental and ecological quality | 14. Foster more and better jobs and social activities to youths, women           |
| 6. Foster growth in high value-added industry clusters using skilled workers and innovation | 9. Improve access to infrastructure and basic services     | 13. Promote climate resilient green development  | 15. Reinforce human capital, social safety net, and inclusion in public services |
| 7. Connect culture and innovation   | 10. Ensure equitable access and quality of social services |  | 16. Strengthen citizen engagement  |
|   | 11. Develop walkable and green neighborhood                |  |  |



# Fundamentals: Institutions & System

Estimated budget  
US\$ 737 mil

## Land market empowerment & integrated planning



- City **cadaster** system development
- **Land allocation, acquisition & compensation** process reform
- **Integrated neighborhood** development
- **Transit-oriented** development
- **City-center regeneration**
- **Poly-centric** development
- Planning and land management **capacity building**



## City data governance & digital development



- **Modernizing information management** system
- City **spatial data infrastructure**
- **Integrated data platform system**
- G2G **e-governance** systems
- **Integrated business system**



## Sustainable municipal financing

- **PFM** capacity building
- **Own Source Revenue** improvement
- **SOEs** management
- **Land & property taxation**
- **PPP or Land-based** financing



## Interagency coordination

- Interagency collaboration **legal & regulatory framework**
- Development of **Institutional mechanism and incentives** for coordinating plans and infrastructure investment
- **Integrated data and IT system** sharing


# Horizontal coordination and vertical coordination are both critical; The two are not substitute for each other

## Vertical Coordination


Federal  
Oromia-Addis Ababa  
Addis Ababa Metropolitan Area  
Addis Ababa City  
11 Sub-cities  
116 Woredas

- Alignment of
- Policies
  - Regulatory frameworks
  - Spatial and development planning


### Possible through..



**Reform** on interagency collaboration **legal & regulatory framework**



**TA** on development of **Institutional mechanism and incentives** for coordinating plans and infrastructure investment



Establish sector-wide **integrated data and IT system**

## Horizontal Coordination

### Across actors

Government entities  
Private sectors  
Citizens and CSOs

### Across sectors

Jobs  
Industry  
Water  
Transport  
Housing  
Digital development  
Education  
Health  
Environment  
Social Protection  
Disaster risk management



# Fundamentals: Institutions & System – Example of proposed actions



## Objective

## 1. Empower land markets and promote integrated planning

### Short term

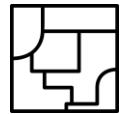
(1-2 years)

### Mid term

(3-5 years)

### Long term

(5+ years)



#### Land administration system strengthening

- Developing action plans and methodology to reinforce **file management, cadaster and registration**
- **land regularization** reform
- **obligatory cadastral updates**

- **Digitizing** landholding files
- Identifying **Land parcels & condominium** in cadaster
- Upgrade **land information system, geodetic network, data center**

- Integrating **land information systems**
- Up-to-date cadaster and registry



#### Land allocation, acquisition & compensation process reform

- Land law reform on **land lease, transfer of rural land rights**
- **Land compensation, lease pricing** reform

- Strengthening **judicial oversight of land laws**
- Improving **land allocation process** ensuring cost recovery

- Sustaining **transparent land allocation, acquisition and compensation** linked with monitoring system



#### Planning & land management capacity building

- Improving **planning, zoning, building regulations**
- Developing **Land use monitoring** system
- Developing a comprehensive **urban land communication and consultation** strategy

- Strengthening **capacity for planning and land use management** for technical staff/physical planners and code enforcement officers
- Implementing a **comprehensive urban land communication strategy**

- Continuous updating of **planning/zoning/building regulation and standards** to guide more resilient and inclusive development



## For Competitive City

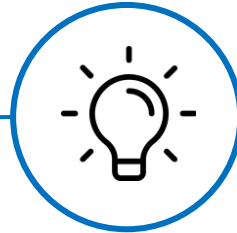
Estimated budget  
US\$ 318 mil

### Business-friendly environment



- **Regulatory barrier** reduction
- Access to **finance, land & services**
- **Industrial parks** operation and management
- **MSME** cluster development
- **Subnational PPP** legal framework

### Skills & innovation for high value-added industry



- **Innovation into full production/business** processes
- **Skills match** for TVET and industries & staff and firms
- **Technological upgrading** of firms

### LED catalyzing cultural & creative assets



- **Tourism** development and leveraging **creative assets**

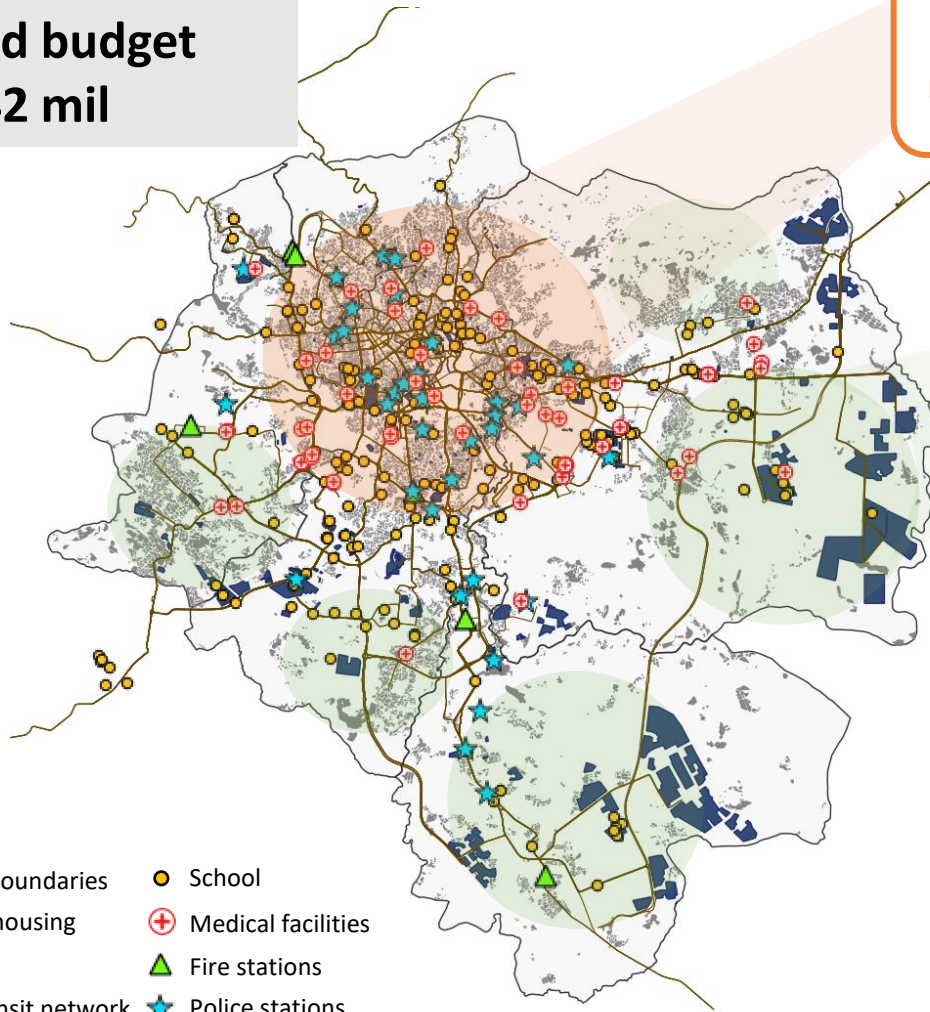






# For Livable City

Estimated budget  
US\$ 4,942 mil



- Sub-city boundaries
- Informal housing
- IHDP
- Public transit network
- School
- + Medical facilities
- ▲ Fire stations
- ★ Police stations



**Revitalizing  
City Centre**

- Slum upgrading
- Conservation of historic urban fabric
- Traffic/parking management
- Street vendor management
- Public spaces development
- NMT facilities management



**Polycentric  
Development**

- Housing, infrastructure and basic/social services
- Transit-oriented development (TOD)
- Public transportation system
- Freight transport management



**City-wide  
Intervention**

- Integrated neighborhood development
- Social services
- Housing finance system
- Urban mobility development
- Electricity
- Water and sanitation
- Solid waste management



**Functional  
Linkages  
with Oromia**

- Coordination mechanism
- Inter-city road/transit network
- Flow of water, natural resources and environmental services
- Industrial value chain
- Disaster risk management



# For Livable City – Example of proposed actions

Objective

9. Improve access to infrastructure and basic services

Initiative

9.3 Transform urban mobility

Action

Improve the quality and reliability of public transportation system - Bus

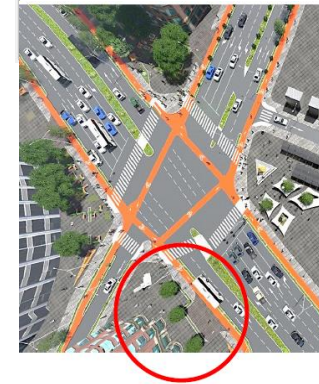
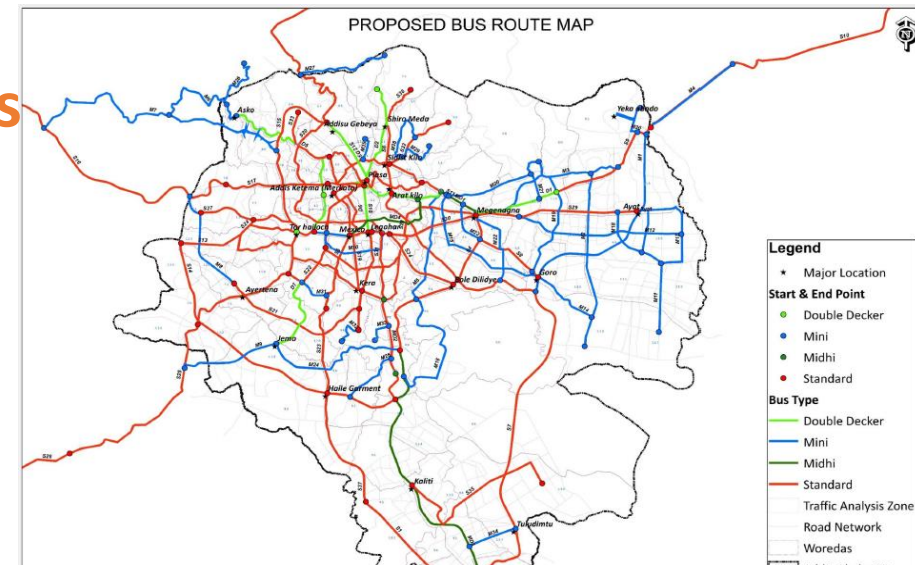
Action Details

S (1-2 years)

M/L (3-5/5+ years)

- Anbessa ITS
- Buses and depot machinery
- Addis Ababa and Federal HQ driver licensing/vehicle registration system
- Conduct a study on BRT development strategies
- Complete B2 & B6 Corridor BRT lines (already under implementation)

- Implementation bus network optimization and reform mini/midi bus sector (Bus Network Optimization)
- Transform urban roads into safe and people centric roads
- Improve LTR and prepare for priority mass transit corridors that are aligned with the city's mobility strategies





## For Sustainable City

Estimated budget  
US\$ 2,282 mil



### Environmental & ecological quality

- **Air/water pollution management**
- **Community awareness raising**
- **Water security**
- **Green spaces protection & development control**



### Climate-resilient green development

- **Low carbon & climate-resilient city development planning**
- **Climate resilient infrastructure development**
- **Disaster Risk Reduction**

Photo: Former informal waste dumping site along the Sheger river re-opened as an urban park



# For Inclusive City

Estimated budget  
US\$ 694 mil

## Better jobs & social activities for youths & women



- Youth/women-targeted jobs and social activities

## Social safety net & public services



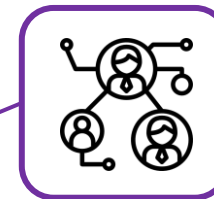
- Expand social safety net programs
- Inclusive design for public spaces
- Public infrastructure for underserved areas



## Human capital development

- Equity in education
- Equity in health services
- Social and economic integration of migrants/IDPs
- Digital literacy

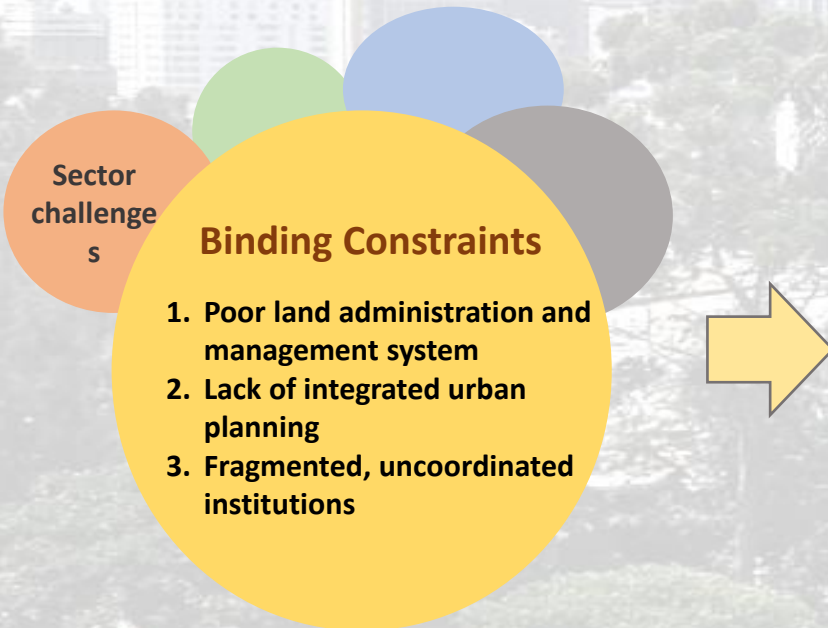
## Citizen engagement



- Citizen engagement mechanism development
- Women empowerment in public investment planning and implementation



# Key reform actions to break policy impediments and unleash Addis' growth potential



1

## Land management and administration

Foster regularizing properties, adopt market-based compensation, reinforce formal transaction, increase land auction, expedite cadastral updates; and simplify lease to enable easy and fast transfer and use of lease as collateral

2

## Integrated urban planning and implementation

Advance evidence-based city planning and management by integrating land use, disaster risk management, transport, housing and infrastructure planning and monitoring systems; increase the capacity to tighten compliance monitoring, development control and enforcement measures; build the capacity to understand and implement integrated plans in a coordinated manner

3

## Interagency coordination

Establish an enforceable incentive mechanism for vertical and horizontal coordination for spatial planning, infrastructure development, and implementation monitoring; and develop advanced knowledge and practice in developing and maintaining city-wide integrated data and IT system

4

## Sustainable financing

Improve public investment management; reinforce property tax; and leverage the value of existing assets to finance public infrastructure and introduce land-based financing such as land value capture, land readjustment, development gains restitution, betterment levies

# Addis Ababa is transforming...



# Addis Ababa is transforming... and more changes are expected



# Addis Ababa will be an addition to the success stories of city transformation

## Safety & Inclusion

*Metrocable/Public Spaces  
Medellin, Colombia*



**IMPACT:**

- ✓ Reduced crime rate
- ✓ Increased urban mobility
- ✓ Increased civic pride
- ✓ Increased access to public infrastructure
- ✓ Increased social inclusion

## Recreation & Resilience

*Sabarmati Riverfront  
Ahmedabad, India*



**IMPACT:**

- ✓ Improved flood protection
- ✓ Increased access to public infrastructure
- ✓ Improved recreational space
- ✓ Increased social inclusion

## Downtown Renewal

*Cheonggyecheon Stream,  
Seoul, Korea*



**IMPACT:**

- ✓ Increased biodiversity
- ✓ Reduced pollution
- ✓ Reduced heat island effect
- ✓ Increased access to green space
- ✓ Increased property values

## Streetscape Improvement

*Times Square  
New York City, USA*



**IMPACT:**

- ✓ Improved pedestrian safety
- ✓ Reduced traffic congestion
- ✓ Improved capacity for public events
- ✓ Improved recreational space

## Environmental Transformation

*Nanjido Park  
Seoul, Korea*



**IMPACT:**

- ✓ Increased biodiversity
- ✓ Improved air quality
- ✓ Increased civic pride
- ✓ Increased access to green space
- ✓ Improved recreational space

## Historic Preservation

*Historic District  
Lahore, Pakistan*



**IMPACT:**

- ✓ Increased tourism
- ✓ Increased economic activity
- ✓ Increased community engagement
- ✓ Increased civic pride

## Ecological Integration

*Bishan-Ang Mo Kio Park  
Bishan, Singapore*



**IMPACT:**

- ✓ Increased biodiversity
- ✓ Reduced pollution
- ✓ Increased access to green space
- ✓ Increased property values

## Innovation & Engagement

*Living Innovation Zones  
San Francisco, USA*



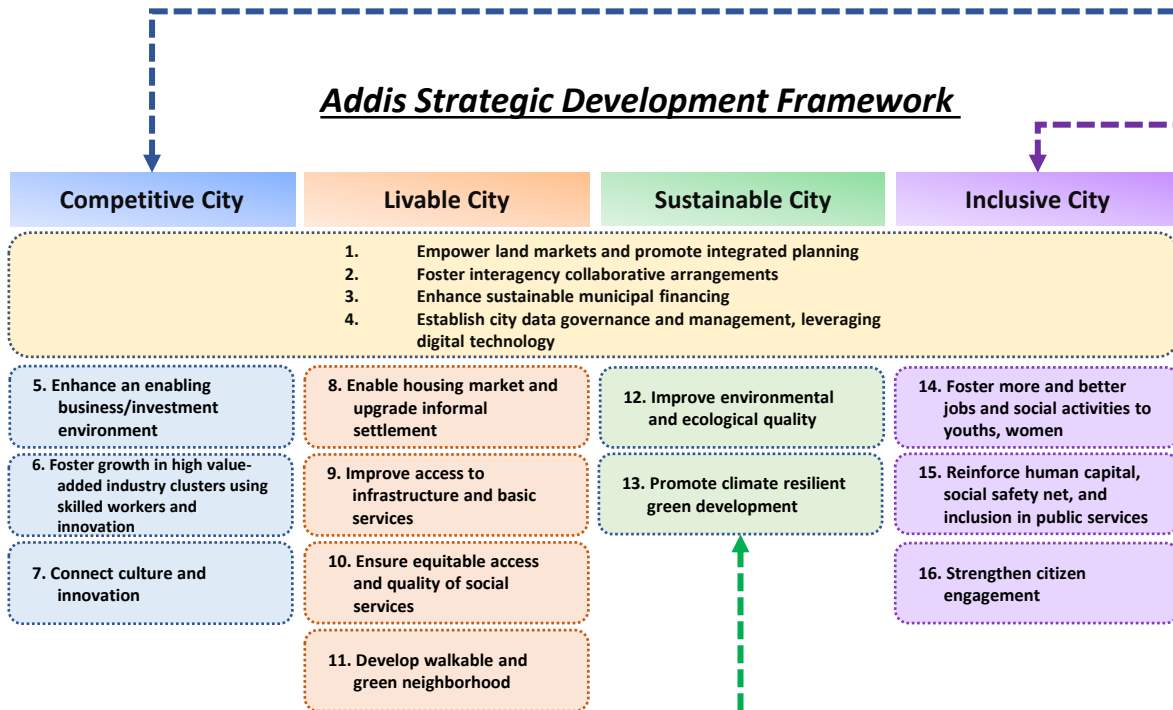
**IMPACT:**

- ✓ Increased civic pride
- ✓ Increased civic engagement
- ✓ Increased access to innovation
- ✓ Increased social inclusion
- ✓ Increased cultural vibrance

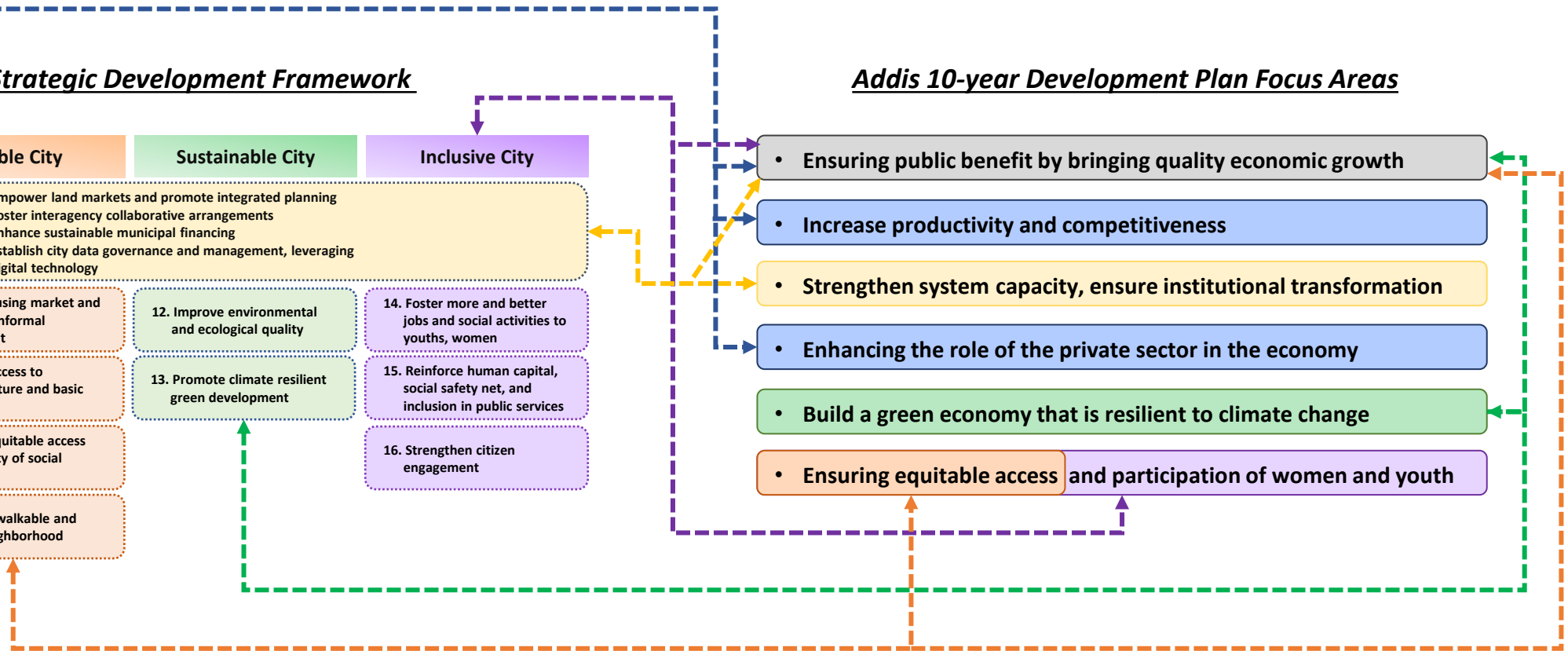
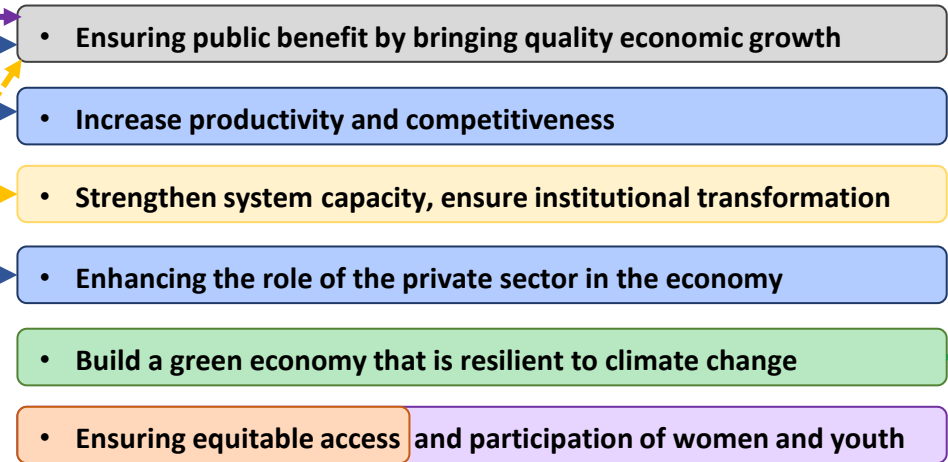


# Linkages between the proposed Strategic Development Framework and Addis Ababa 10-year Development Plan

## Addis Strategic Development Framework



## Addis 10-year Development Plan Focus Areas



# Limitations & Gaps

## City data gaps

- Population data – difference among sources
- Migration data
- Poverty rate, location of the poor population
- Slum profiles
- Job locations
- Institutional assessment on interagency coordination
- Transportation affordability



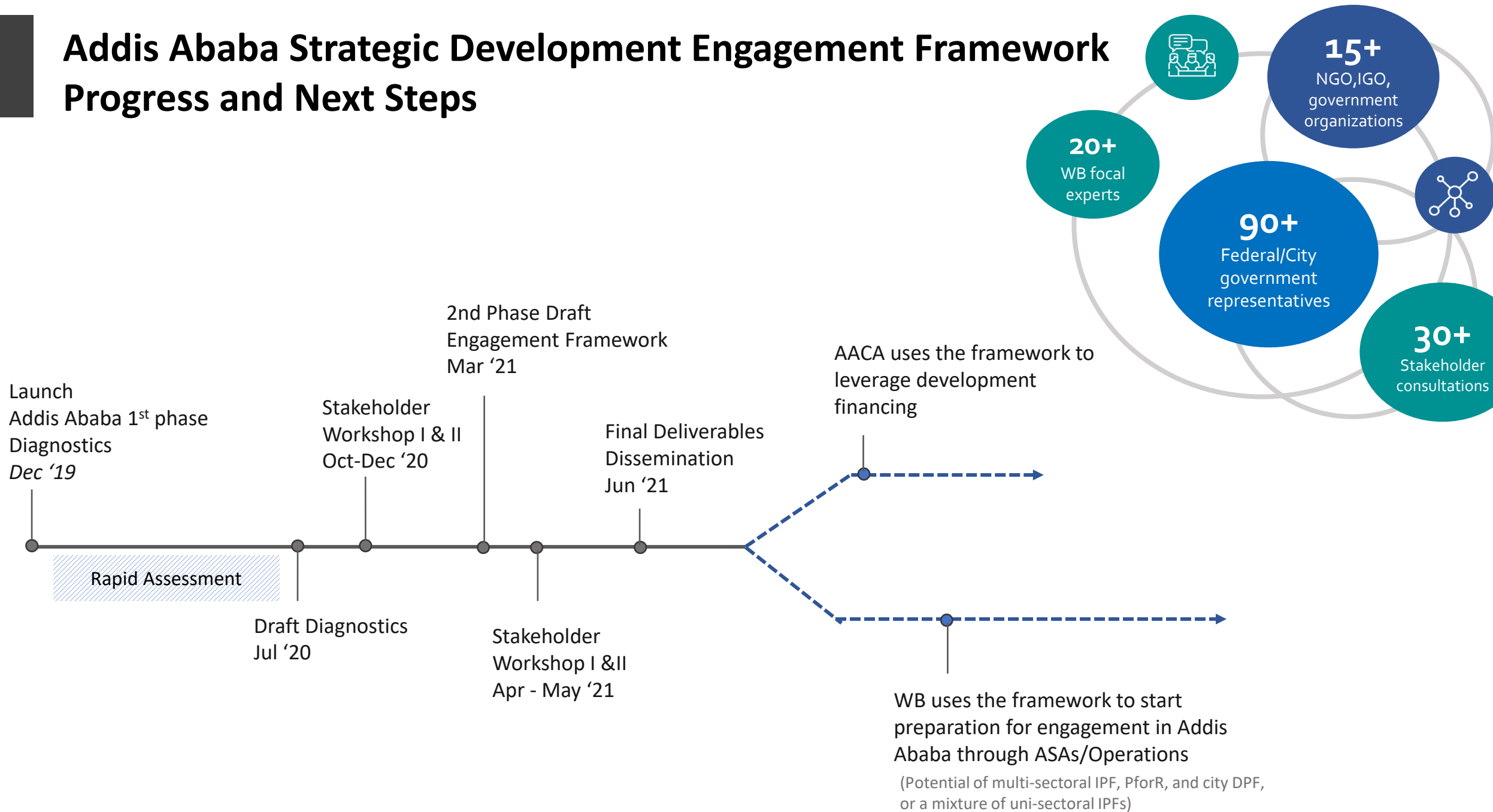
**Further studies are needed**

## Limitations

- Incorporation of limited City government and DP project information, available online
- Less focus on federal services
- Rough financing estimates subject to the scope of work

# Addis Ababa Strategic Development Engagement Framework

## Progress and Next Steps



## **VI. Technical Annex I**

(Refer to the attached excel sheet for action details/budgets)

An aerial photograph of a city, likely Johannesburg, South Africa. The image shows a mix of urban development, including a large stadium with a red track and green field, a tall skyscraper under construction with a crane, and various other buildings and roads. The sky is clear and blue.

# Fundamentals

---

## Institutions & System

Integrated land planning | Inter-agency coordination  
| Sustainable municipal financing | Data governance & management



## Cross-cutting Institutions & System

**1** Empower **land** markets and promote **integrated planning**

**2** Foster **interagency collaborative arrangements**

**3** Enhance **sustainable municipal financing**

**4** Establish **smart city data infrastructure**, leveraging digital technology

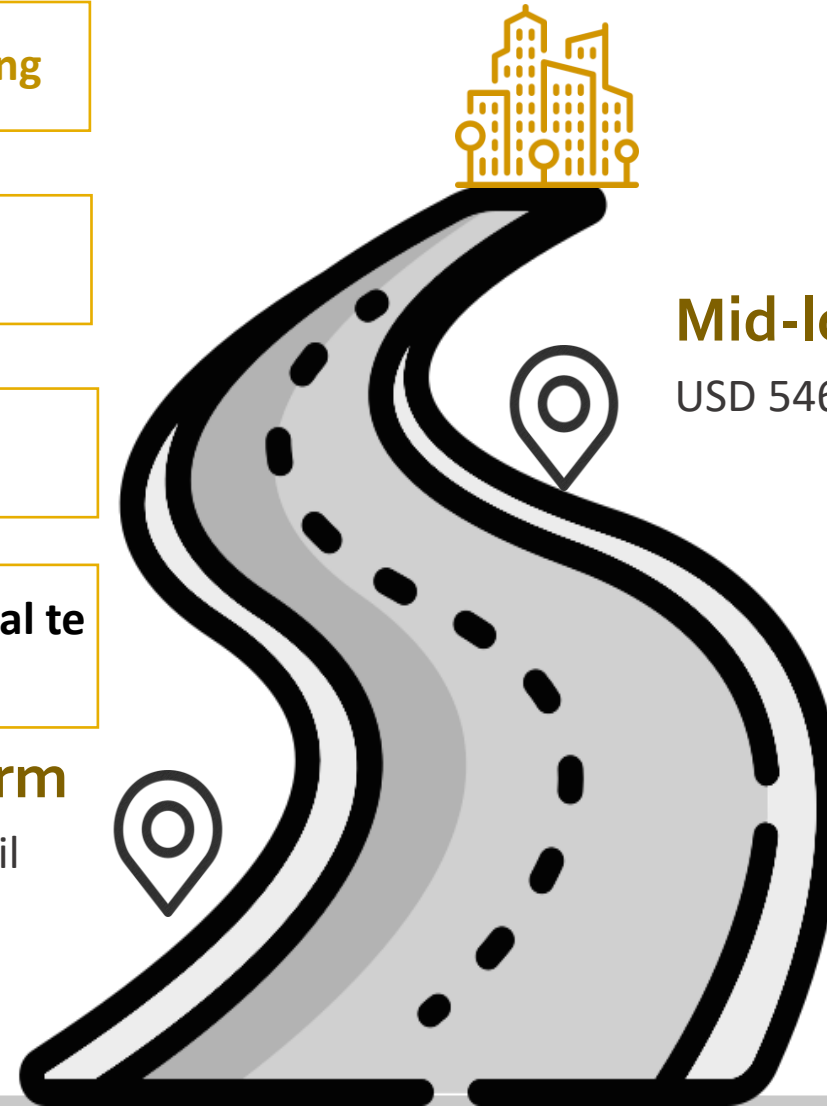
**Short Term**

USD 191 mil



**Mid-long Term**

USD 546 mil





## Cross-cutting Institutions & System

### 1. Empower land markets and promote integrated planning

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>1.1 Strengthen land administration systems</b>	<ul style="list-style-type: none"> <li>Reinforce file management, cadaster, and registration</li> </ul>	- (IFC) TA on improving AA cadastral information system to increase doing business scale of AA	on-going	S, M
	<ul style="list-style-type: none"> <li>Complete urban cadaster systems</li> </ul>			M
	<ul style="list-style-type: none"> <li>Reform lease law (planning conformity)</li> </ul>			M
<b>1.2 Balance between supply and demand of land</b>	<ul style="list-style-type: none"> <li>Reform land law (clarify lease law and laws in transfer of rural land rights)</li> </ul>	- A study on urban land and affordable housing completed with policy recommendations	closed	S, M
	<ul style="list-style-type: none"> <li>Improve land allocation process</li> </ul>			S, M
	<ul style="list-style-type: none"> <li>Reform land lease pricing mechanism to enable easy, swift transfer and use of land lease as collateral</li> </ul>			S



## Cross-cutting Institutions & System

### 1. Empower land markets and promote integrated planning

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>1.3 Promote inclusive and transparent land acquisition and compensation process</b>	<ul style="list-style-type: none"> <li>Reform compensation policy, update/revise formal procedures and implementation manuals</li> </ul>			S
<b>1.4 Improve planning, enforcement, and land management capacity</b>	<ul style="list-style-type: none"> <li>Reinforce land use monitoring system</li> </ul>			S
	<ul style="list-style-type: none"> <li>Improve planning, zoning, building regulations and standards for resilience and inclusiveness and streamline administrative process</li> </ul>	Building regulation reviewed by AACA	on-going by Gov	S
	<ul style="list-style-type: none"> <li>Build capacity of technical staff/physical planners and code enforcement officers in sub-city/woreda level</li> </ul>			M
	<ul style="list-style-type: none"> <li>Develop neighborhood/detail plans for prioritized areas and formal mechanism/systems in developing/ reviewing/implementing detail plans</li> </ul>			S
	<ul style="list-style-type: none"> <li>Strengthen land development and management capability at city, sub-city levels</li> </ul>			S
	<ul style="list-style-type: none"> <li>Develop and implement a comprehensive urban land communication and consultation strategy</li> </ul>			M





## Cross-cutting Institutions & System

### 1. Empower land markets and promote integrated planning

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
1.5 Regenerate and revitalize the city center	• Develop regeneration plan for city center			S
	• Develop historic/cultural conservation plan for city center			S
1.6 Promote polycentric development planning	• Develop strategic and spatial plans for secondary and tertiary centers			S
	• Promote transit-oriented development			S



## Cross-cutting Institutions & System

### 2. Foster interagency collaborative arrangements

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>2.1. Reform legal and regulatory frameworks for interagency coordination</b>	<ul style="list-style-type: none"><li>Identify most viable coordination option and establish corresponding legal and regulatory frameworks</li></ul>			S,M
<b>2.2. Develop and improve Institutional arrangements and capacity</b>	<ul style="list-style-type: none"><li>Improve vertical coordination on planning</li></ul>			S,M
	<ul style="list-style-type: none"><li>Improve horizontal coordination on planning and implementation of plans and projects</li></ul>			S,M
<b>2.3 Improve information and knowledge sharing systems</b>	<ul style="list-style-type: none"><li>Establish sector-wide integrated data and IT system</li></ul>			S,M



## Cross-cutting Institutions & System

### 3. Enhance sustainable municipal financing

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>3.1 Enhance PFM capacity</b>	<ul style="list-style-type: none"> <li>Develop and implement a comprehensive PFM strategy for the city</li> </ul>	<ul style="list-style-type: none"> <li>Investment on improving efficiency, transparency and accountability of PFM;</li> <li>Two studies on assessing public procurement/ financial system</li> </ul>	<ul style="list-style-type: none"> <li>On-going</li> <li>Closed</li> </ul>	S,M
	<ul style="list-style-type: none"> <li>Improve performance-based budgeting</li> </ul>			S,M
	<ul style="list-style-type: none"> <li>Improve Public Investment Management (PIM)</li> </ul>			S
	<ul style="list-style-type: none"> <li>Strengthen policy and institutional and financial management of SOEs</li> </ul>			S
	<ul style="list-style-type: none"> <li>Launch national governance program or city specific governance program</li> </ul>	<ul style="list-style-type: none"> <li>Investment on improving efficiency, transparency and accountability of PFM;</li> <li>Two studies on assessing public procurement/ financial system</li> </ul>	<ul style="list-style-type: none"> <li>On-going</li> <li>Closed</li> <li>Digital platform projects on-going by Gov</li> </ul>	M



## Cross-cutting Institutions & System

### 3. Enhance sustainable municipal financing

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
3.2 Improve land taxation	<ul style="list-style-type: none"> <li>Upgrade valuation mechanism and reinforce property taxation</li> </ul>			S
	<ul style="list-style-type: none"> <li>Enhance real property asset management systems</li> </ul>			S
	<ul style="list-style-type: none"> <li>Strengthen legal and institutional framework for property taxation</li> </ul>			S
3.3 Create fiscal space for investment through land-based financing (LBF)	<ul style="list-style-type: none"> <li>Explore the potential of LBF and utilize the most appropriate tool in Addis Ababa context</li> </ul>			S,M
3.4 Increase own source revenue	<ul style="list-style-type: none"> <li>Increase municipality revenue sources and improve their collection</li> </ul>			S
3.5. Mobilize private investment in public services	<ul style="list-style-type: none"> <li>Mobilize private investment in public infrastructure and services</li> </ul>			M,L



## Cross-cutting Institutions & System

### 4. Establish smart city data infrastructure, leveraging digital technology

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>4.1 Build and institutionalize city spatial data infrastructure for evidence-based city planning and management</b>	<ul style="list-style-type: none"> <li>Assess the readiness of city spatial data infrastructure</li> </ul>			S
	<ul style="list-style-type: none"> <li>Develop local regulations and data governance protocols</li> </ul>			S
	<ul style="list-style-type: none"> <li>Develop competency frameworks and skill development</li> </ul>	- Investment in nurturing digital entrepreneurship and innovation hubs in Addis Ababa	pipeline	S
	<ul style="list-style-type: none"> <li>Build capacity of the city to collect, process, produce, manage, and analyze data</li> </ul>			S
	<ul style="list-style-type: none"> <li>Establish a smart urban integrated data platform incorporating spatial and tabular data</li> </ul>			S,M



## Cross-cutting Institutions & System

### 4. Establish smart city data infrastructure, leveraging digital technology

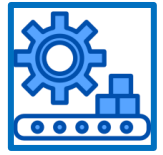
Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
4.2 Develop and strengthen e-governance Systems	<ul style="list-style-type: none"> <li>Develop policy for digitalization of government functions</li> </ul>			S
	<ul style="list-style-type: none"> <li>Build G2G e-governance systems to increase data connectivity among different agencies</li> </ul>			S, M
	<ul style="list-style-type: none"> <li>Computerize and modernize information management systems of AACA key bureaus</li> </ul>			M
	<ul style="list-style-type: none"> <li>Implement job-oriented capacity building program for government officials</li> </ul>			S
	<ul style="list-style-type: none"> <li>Launch digital ID system project</li> </ul>		on-going by Gov	M
	<ul style="list-style-type: none"> <li>Launch upgrading e-Tax system project</li> </ul>			M
	<ul style="list-style-type: none"> <li>Design and pilot digital literacy projects</li> </ul>	- Investment in nurturing digital entrepreneurship and innovation hubs in Addis Ababa	pipeline	M
	<ul style="list-style-type: none"> <li>Build an integrated e-business system (one-stop-shop) portals for SME clusters including tax paying, e-procurement that links SME clusters and buyers</li> </ul>	- (IFC IC team) An analysis on all business licenses and upgraded the existing ICT system for business registration—Online Trade Registration and Licensing System (OTRLS) in 130 sites in Addis Ababa.		S,M

A woman wearing a red blazer and a colorful patterned headscarf is smiling warmly at the camera. She is seated at a sewing machine in a factory setting, with other workers and machines visible in the background. The scene is brightly lit, and the overall atmosphere is one of productivity and skill.

# Pathway #1

## A Competitive City

Business environment | Skills & Innovation | Cultural assets



## For Competitive City

5 Enhance an enabling **business/investment environment**

6 Foster growth in high value-added industry clusters using **skilled workers and innovation**

7 Connect **culture** and innovation

**Short Term**

USD 73 mil

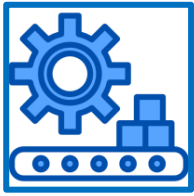


**Mid-long Term**

USD 245 mil







## For Competitive City

### 5. Enhance an enabling business/investment environment

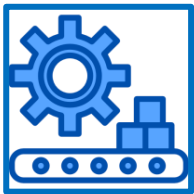
Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
5.1 Reduce regulatory barriers for business investment	<ul style="list-style-type: none"> <li>Revise/update tax revenue administration laws</li> </ul>	- Investment in strengthening the regulatory framework to underpin an effective industrial zones program	on-going	S
	<ul style="list-style-type: none"> <li>Update/revise laws/manuals on permits and licenses to start business and building construction</li> </ul>			S
5.2 Improve access to finance and market	<ul style="list-style-type: none"> <li>Increase access to finance for eligible SMEs and improve local market linkages</li> </ul>	<ul style="list-style-type: none"> <li>- Investment in supporting business linkages through i) skills development center, and ii) business-to-business linkage fund;</li> <li>- Investment in establishing a credit facility providing access to finance</li> </ul>	<ul style="list-style-type: none"> <li>on-going</li> <li>on-going</li> </ul>	S, M
	<ul style="list-style-type: none"> <li>Facilitate market linkages between domestic SMEs and higher value chains and foreign investors/buyers</li> </ul>	<ul style="list-style-type: none"> <li>- Investment in organizing international investor events and in establishing a customer relations management system incl. due diligence on incoming investors.</li> </ul>	on-going	S, M



## For Competitive City

### 5. Enhance an enabling business/investment environment

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
5.3 Improve access to services and land for private sector and industrial parks	<ul style="list-style-type: none"> <li>Improve the access to transportation, ICT, the reliability of electricity and water, and the management of environmental facilities</li> </ul>			S,M
	<ul style="list-style-type: none"> <li>Enhance the management of industrial park operations and services</li> </ul>	- A study on identifying specific constraints that hinder active participation of the private sector and maximizing the impact of industrial parks-led industrial policy	on-going	S
	<ul style="list-style-type: none"> <li>Improve the quality and penetration of Internet service in Addis Ababa</li> </ul>			M
5.4 Promote MSME growth and develop entrepreneurship	<ul style="list-style-type: none"> <li>Increase access to services and production sheds for MSME cluster development</li> </ul>			S
5.5 Promote Private sector development and Public-private partnership	<ul style="list-style-type: none"> <li>Develop subnational public-private partnership legal framework and strengthen support services for private sector development</li> </ul>			S



## For Competitive City

### 6. Foster growth in high value-added industry clusters using skilled workers and innovation

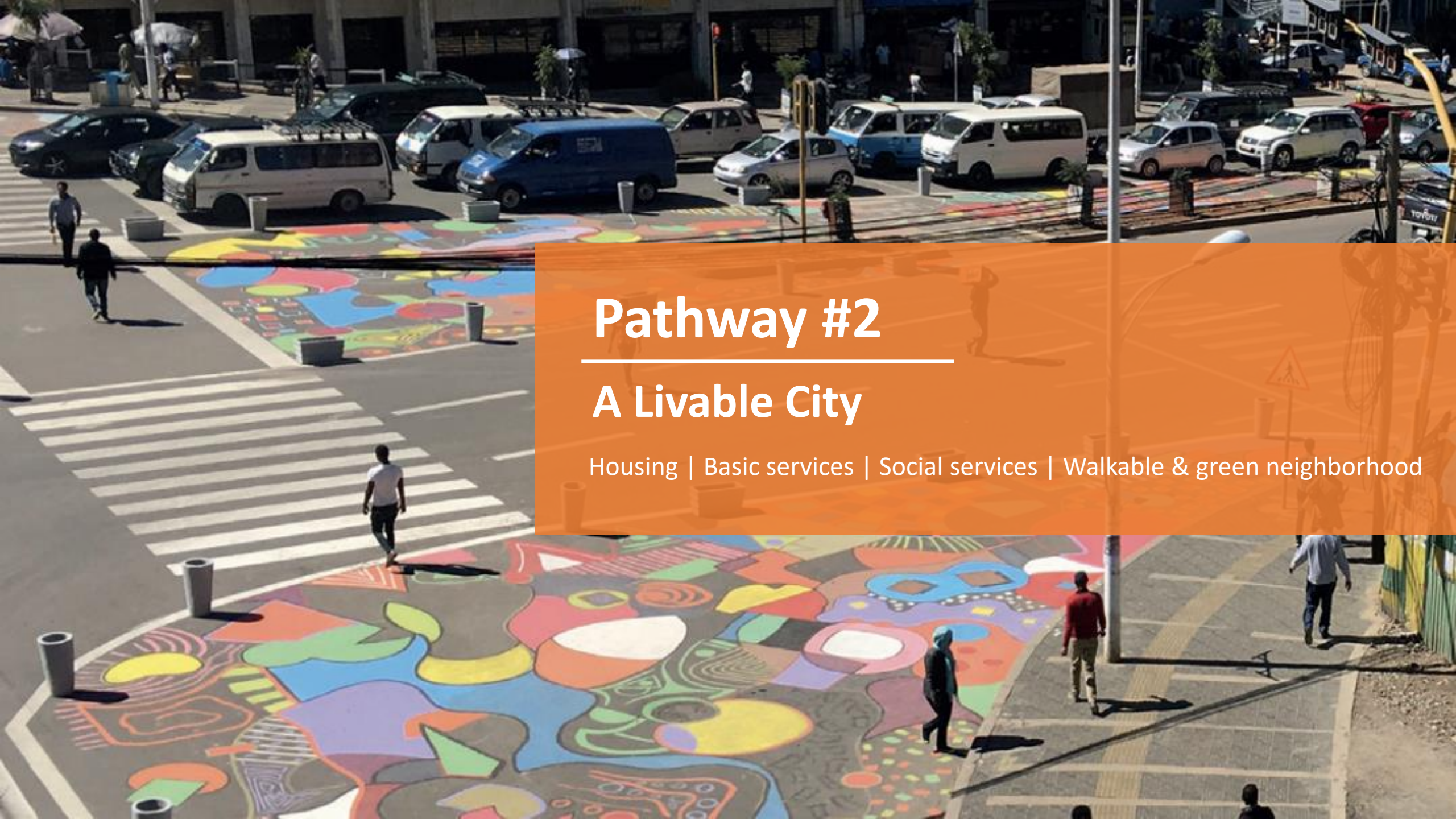
Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>6.1 Enhance skill development and promote innovation</b>	<ul style="list-style-type: none"> <li>Increase firms' absorptive capacity and integrate innovation into the full production and business processes</li> </ul>	- Investment in supporting SMEs through the provision of tailored Business Development Services (BDS) to address constraints on the demand side to develop bankable business plans	on-going	S
	<ul style="list-style-type: none"> <li>Enhance skills match for TVET and industries as well as staff and firms</li> </ul>			M
	<ul style="list-style-type: none"> <li>Support technological upgrading of firms to boost their operational efficiency</li> </ul>	- Investment in developing a website as a tool in marketing; - Investment in supporting the hardware and associated software requirements, licenses, capacity building and training for a centralized electronic collateral registry	on-going on-going	S,M
<b>6.2 Enhance industrial linkages of industries' value chains between Addis Ababa and Surrounding Oromia towns</b>	<ul style="list-style-type: none"> <li>Seek the opportunity of enhancing industries' value chains and maximize the coordination potential</li> </ul>			S



## For Competitive City

### 7. Connect culture and innovation

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
7.1 Leverage cultural and creative assets and develop tourism	<ul style="list-style-type: none"><li>Set up and implement coherent tourism plan, marketing, promotion and advertising programs</li></ul>			S
	<ul style="list-style-type: none"><li>Catalyze cultural and creative assets for local economic development</li></ul>			M



## Pathway #2

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### A Livable City

Housing | Basic services | Social services | Walkable & green neighborhood



## For Livable City

8 Enable **housing** market and upgrade informal settlement

9 Improve access to infrastructure and **basic services**

10 Ensure equitable access and quality of **social services**

11 Develop **walkable and green** neighborhood

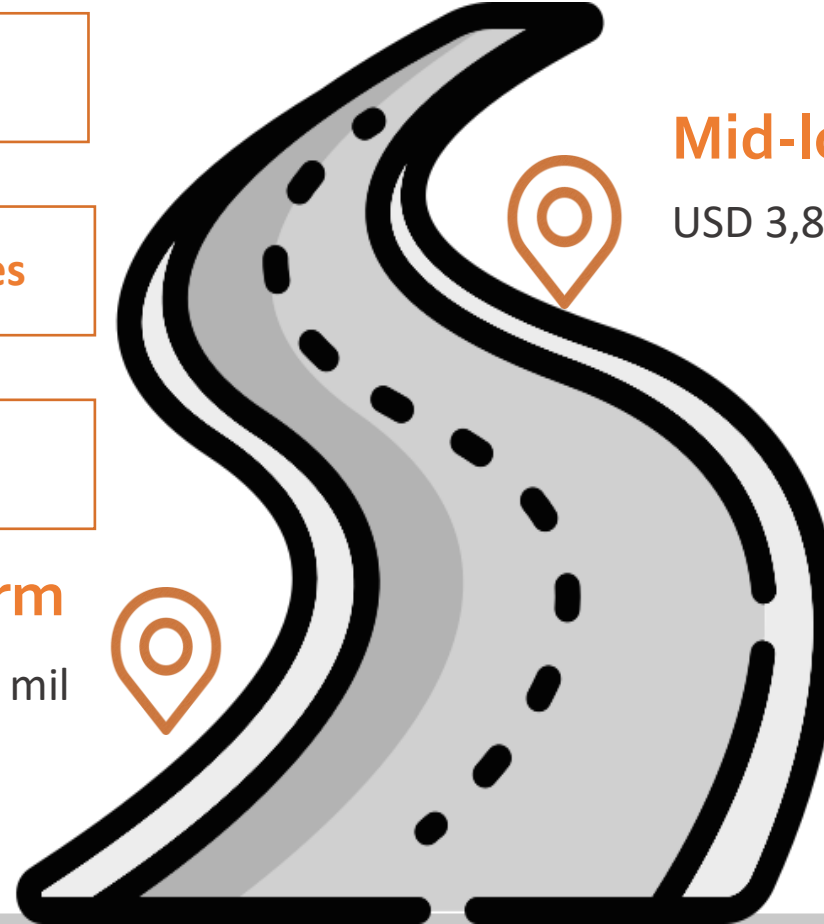
**Short Term**

USD 1,113.0 mil



**Mid-long Term**

USD 3,829.2 mil





## For Livable City

### 8. Enable housing market and upgrade informal settlement

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
8.1 Reform housing governance structure and regulatory framework	<ul style="list-style-type: none"> <li>Renew housing governance structure</li> </ul>	- A study on urban land and affordable housing completed with policy recommendations	closed	S,M
	<ul style="list-style-type: none"> <li>Craft rental housing law and enact real estate proclamation</li> </ul>			S,M
	<ul style="list-style-type: none"> <li>Adjust neighborhood development standards, streamline legal and administrative processes, remove fees</li> </ul>			S
8.2 Improve land administration, planning and construction standards	<ul style="list-style-type: none"> <li>Strengthen cadaster and land registry systems and land management practices</li> </ul>			S
	<ul style="list-style-type: none"> <li>Improve city and neighborhood planning and building standards</li> </ul>			S
	<ul style="list-style-type: none"> <li>Update more flexible regulations and standards for incremental improvement</li> </ul>			S
	<ul style="list-style-type: none"> <li>Strengthen domestic construction and building material sectors</li> </ul>			S



## For Livable City

### 8. Enable housing market and upgrade informal settlement

Initiatives	Actions	WB past/on-going Intervention	Status	Timeframe
8.3 Increase housing supply	<ul style="list-style-type: none"> <li>Auction more serviced land for private development and cooperative housing</li> </ul>			S
	<ul style="list-style-type: none"> <li>Reform IHDP and create targeted subsidy scheme</li> </ul>			S
	<ul style="list-style-type: none"> <li>Explore alternative affordable housing modalities than IHDP</li> </ul>			S
	<ul style="list-style-type: none"> <li>Support rental markets</li> </ul>	- A study on investigating demand and supply side dynamics of rental housing markets for employees of industrial parks in AA	closed	S,M





## For Livable City

### 8. Enable housing market and upgrade informal settlement

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>8.4 Improve quality of housing and upgrade informal settlement</b>	• Connect to infrastructure and services			S
	• Develop construction technical assistance tools			S
	• Revive sites & services programs			S
	• Establish a strategic development approach to informal settlement upgrading with inclusionary redevelopment models			S
	• Launch community-based upgrading programs			M
<b>8.5 Foster housing finance system with increased confidence and transparency</b>	• Expand NBE's banking supervision & consumer protection activities			S
	• Take measures to increase transparency & flow of information in the housing finance and real estate industries			S
	• Increase access to long terms funds			S
	• Explore and expand housing financing instruments, including guarantee programs, housing bonds and mortgage refinance facility			M
	• Explore creation of a facility that provides development finance loans to small scale developers undertaking affordable housing development			M



## For Livable City

### 9. Improve access to infrastructure and basic services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>9.1 Enhance water and sanitation service delivery</b>	<ul style="list-style-type: none"> <li>Enhance water sector policy and administrative management</li> </ul>	- Investment in improving AAWSA's monitoring and evaluation systems in data gathering, installing a new computerized billing and accounting system and a new customer service and financial management system	closed	S,M
	<ul style="list-style-type: none"> <li>Strengthen water resource management and ensure water security</li> </ul>			S,M,L
	<ul style="list-style-type: none"> <li>Improve water supply systems</li> </ul>	- Investment in adopting measures to address NRW	on-going	S,M,L
	<ul style="list-style-type: none"> <li>Improve sanitation systems</li> </ul>	- Investment in financing the construction of sanitation facilities and implementing appropriate cost-effective sanitation options	on-going	S,M,L
	<ul style="list-style-type: none"> <li>Facilitate private sector participation</li> </ul>			S
	<ul style="list-style-type: none"> <li>Strategic financial planning for water supply and sanitation</li> </ul>			S
	<ul style="list-style-type: none"> <li>Improve integrated catchment management</li> </ul>			S,M



## For Livable City

### 9. Improve access to infrastructure and basic services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
9.2 Improve solid waste management	<ul style="list-style-type: none"> <li>Improve integrated strategic planning process and administrative management</li> </ul>	- TA on integrating the Climate Resilient Green Economy (CRGE) Strategy vision into AA City Dev. Plan	on-going	S,M
	<ul style="list-style-type: none"> <li>Improve waste collection and transportation</li> </ul>			S,M,L
	<ul style="list-style-type: none"> <li>Enhance separation and recycling</li> </ul>			S,M,L
	<ul style="list-style-type: none"> <li>Improve waste disposal</li> </ul>			S,M,L



## For Livable City

### 9. Improve access to infrastructure and basic services

Initiatives	Actions	WB past/on-going Intervention	Status	Timeframe
<b>9.3 Transform urban mobility</b> (cont'd in the next slide)	<ul style="list-style-type: none"> <li>Strengthen institutions and capacity</li> </ul>	- Develop capacity in ITS and invest in developing main ITS (TMC and corridors) and a study on transport asset management, public transport policy reform, and human capital development plan	on-going	S
	<ul style="list-style-type: none"> <li>Improve the quality and reliability of public transportation system – bus, including implementing bus network optimization recommendations</li> </ul>	- Completed studies on bus network optimization - Invest in Anbessa ITS, buses and depot machinery, driver licensing/vehicle registration system, a study is on-going on BRT strategies.	on-going	S,M,L
	<ul style="list-style-type: none"> <li>Improve public transportation system - LRT</li> </ul>	- A study on identifying concrete actions and investments to implement railway reform of Addis-Djibouti line	on-going	S



## For Livable City

### 9. Improve access to infrastructure and basic services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>9.3 Transform urban mobility (cont'd)</b>	<ul style="list-style-type: none"> <li>Advance urban mobility development, improving road network</li> </ul>	- Investment in developing Corridor 1 - British Ave - Africa Ave, and other corridors designed under TRANSIP and in city's plans	on-going	S,M,L
	<ul style="list-style-type: none"> <li>Improve freight transport management</li> </ul>	- (IFC) Design for both Wulute Suke and Goro Bole terminals are complete; Design procurement stage for Andode, and Tulu Demitu is underway.	on-going	S,M
	<ul style="list-style-type: none"> <li>Promote transit-oriented development and improve inter-city connectivity to Oromia region</li> </ul>	- A study on TOD and investment in constructing Megenagna Intra-City Public Transport Terminal in Yeka (design completed, on the procurement stage; design for Pisa is underway	on-going	S,M,L
	<ul style="list-style-type: none"> <li>Improve road safety</li> </ul>			S
	<ul style="list-style-type: none"> <li>Strengthen traffic management</li> </ul>			S
	<ul style="list-style-type: none"> <li>Enhance parking management</li> </ul>			S



## For Livable City

### 9. Improve access to infrastructure and basic services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
9.4 Improve electricity services and reliability	<ul style="list-style-type: none"> <li>Enhance power sector policy and administrative management</li> </ul>	<ul style="list-style-type: none"> <li>- Investment in reinforcing and expanding electricity network through grid upgrade/ extension;</li> <li>- Investment underway in strengthening supply network</li> </ul>	on-going pipeline	S
	<ul style="list-style-type: none"> <li>Improve generation and power security</li> </ul>			M
	<ul style="list-style-type: none"> <li>Increase efficient and reliable power distribution services</li> </ul>			M
9.5 Infrastructure provision through greater financial viability and private sector participation	<ul style="list-style-type: none"> <li>Strengthen legal framework for private sector participation in urban infrastructure and service and various modes financing</li> </ul>			S
	<ul style="list-style-type: none"> <li>Develop guidelines and model procurement and contract documents for various types of private sector participation in urban infrastructure and services</li> </ul>			M
	<ul style="list-style-type: none"> <li>Identify viable pilots and conduct prefeasibility and feasibility studies for identified pilots</li> </ul>			M



## For Livable City

### 10. Ensure equitable access and quality of social services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>10.1 Increase the access and improve the quality of education</b>	<ul style="list-style-type: none"> <li>Deliver quality post-graduate education and build collaborative research capacity</li> </ul>	- Investment in establishing three African centers of excellence (ACE) at Addis Ababa university	on-going	S
	<ul style="list-style-type: none"> <li>Improve internal efficiency, equitable access, and quality in general education</li> </ul>	<ul style="list-style-type: none"> <li>- Investment in providing Quality Enhancement and Assurance Package, school grant and textbooks to public schools, and professional development of teachers;</li> <li>- TAs on inclusive education programming, and school mapping</li> </ul>	<ul style="list-style-type: none"> <li>on-going</li> <li>on-going</li> <li>on-going</li> </ul>	S
	<ul style="list-style-type: none"> <li>Increase the access and improve the quality of TVET programs and to support regional integration and regional economic corridors</li> </ul>	- Investment in establishing new TVET institutes	on-going	S
	<ul style="list-style-type: none"> <li>Improve human capital outcomes through improved student learning, child nutrition and social protection for vulnerable households</li> </ul>	- Investment in strengthening basic services incl. education, health	pipeline	S
	<ul style="list-style-type: none"> <li>Improve equity, efficiency, effectiveness, adequacy of public spending on education</li> </ul>	- A study on assessing the sustainability of public spending on education	on-going	S



## For Livable City

### 10. Ensure equitable access and quality of social services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>10.2 Increase the access and improve the quality of health services</b>	<ul style="list-style-type: none"> <li>Conduct in-depth situational analysis and systematic diagnostic of the existing health system</li> </ul>			S
	<ul style="list-style-type: none"> <li>Improve health system responsiveness and health care financing</li> </ul>	- A study on Addis Ababa facility level PFM analysis	on-going	M
	<ul style="list-style-type: none"> <li>Increase health care facilities and equipment</li> </ul>	- Investment in providing medical supplies and equipment and establishing quarantine, isolation and treatment centers	on-going	M
	<ul style="list-style-type: none"> <li>Strengthen enforcement on the health and health related regulations including food safety regulation</li> </ul>			M
<b>10.3 Strengthen urban safety net mechanisms and support for the poor household affected by COVID-19</b>	<ul style="list-style-type: none"> <li>Improve income of targeted poor households by public works projects</li> </ul>	- Investment in improving income of targeted poor households and establish urban safety net in 782 KETENAS , 11 KIFLE KETEMAS	on-going	S
	<ul style="list-style-type: none"> <li>Support for the poor household affected by COVID-19</li> </ul>	- Investment in supporting those affected by COVID-19 in 782 KETENAS , 11 KIFLE KETEMAS areas	on-going	S,M
	<ul style="list-style-type: none"> <li>Develop the first Social Protection System Management Information System (MIS)</li> </ul>			S





## For Livable City

### 11. Develop walkable and green neighborhood

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>11.1 Make Addis Ababa more walkable</b>	<ul style="list-style-type: none"> <li>Improve non-motorized facility management and maintenance (sidewalks, crosswalks, paths and bike lanes, etc.)</li> </ul>	- A study to support TRANSIP implementation by providing evidence-based sidewalk safety through digital data collection in a LRT corridor and formulating strategies to improve sidewalk planning and design	on-going	S,M
	<ul style="list-style-type: none"> <li>Develop pedestrian oriented land use and building design</li> </ul>			S
	<ul style="list-style-type: none"> <li>Promote street vendor management</li> </ul>			M
<b>11.2 Protect, improve and increase urban open spaces</b>	<ul style="list-style-type: none"> <li>Increase parks, recreation, and open space development</li> </ul>			S,M,L



# Pathway #3

## A Sustainable City

Environment & Ecology | Climate resilient green development



## For Sustainable City

12

Improve **environmental and ecological quality**

13

Promote **climate resilient green development**

**Short Term**

USD 66.5 mil



**Mid-long Term**

USD 2,214.4mil





## For Sustainable City

### 12. Improve environmental and ecological quality

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>12.1 Improve air quality</b>	<ul style="list-style-type: none"> <li>Develop urban air quality management strategy, plan and standards</li> </ul>	- A study on air pollution situation and vehicle emission control in Addis and develop a road map for institutional strengthening and physical investments in AQM	on-going	S
	<ul style="list-style-type: none"> <li>Improve air pollution monitoring and control capacity</li> </ul>			S,M
	<ul style="list-style-type: none"> <li>Raise community awareness on air quality management</li> </ul>			S,M,L
	<ul style="list-style-type: none"> <li>Reduce transport sector's emission</li> </ul>			S,M



## For Sustainable City

### 12. Improve environmental and ecological quality

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
12.2 Manage water pollution	<ul style="list-style-type: none"> <li>Develop urban water pollution control implementation plan</li> </ul>			S
	<ul style="list-style-type: none"> <li>Improve water pollution monitoring, control, and enforcement capacity</li> </ul>			M
	<ul style="list-style-type: none"> <li>Raise community awareness on water quality management and waste disposal</li> </ul>			M
12.3 Improve water security	<ul style="list-style-type: none"> <li>Address water supply deficit and develop new surface and ground water source</li> </ul>			M
	<ul style="list-style-type: none"> <li>Reduce non-revenue water in water distribution system</li> </ul>			M
12.4 Protect green spaces and urban ecosystem	<ul style="list-style-type: none"> <li>Preserve forest land, green spaces and urban ecosystem</li> </ul>			S,M
	<ul style="list-style-type: none"> <li>Strengthen development control and enforcement</li> </ul>			S,M



## For Sustainable City

### 13. Promote climate resilient green development

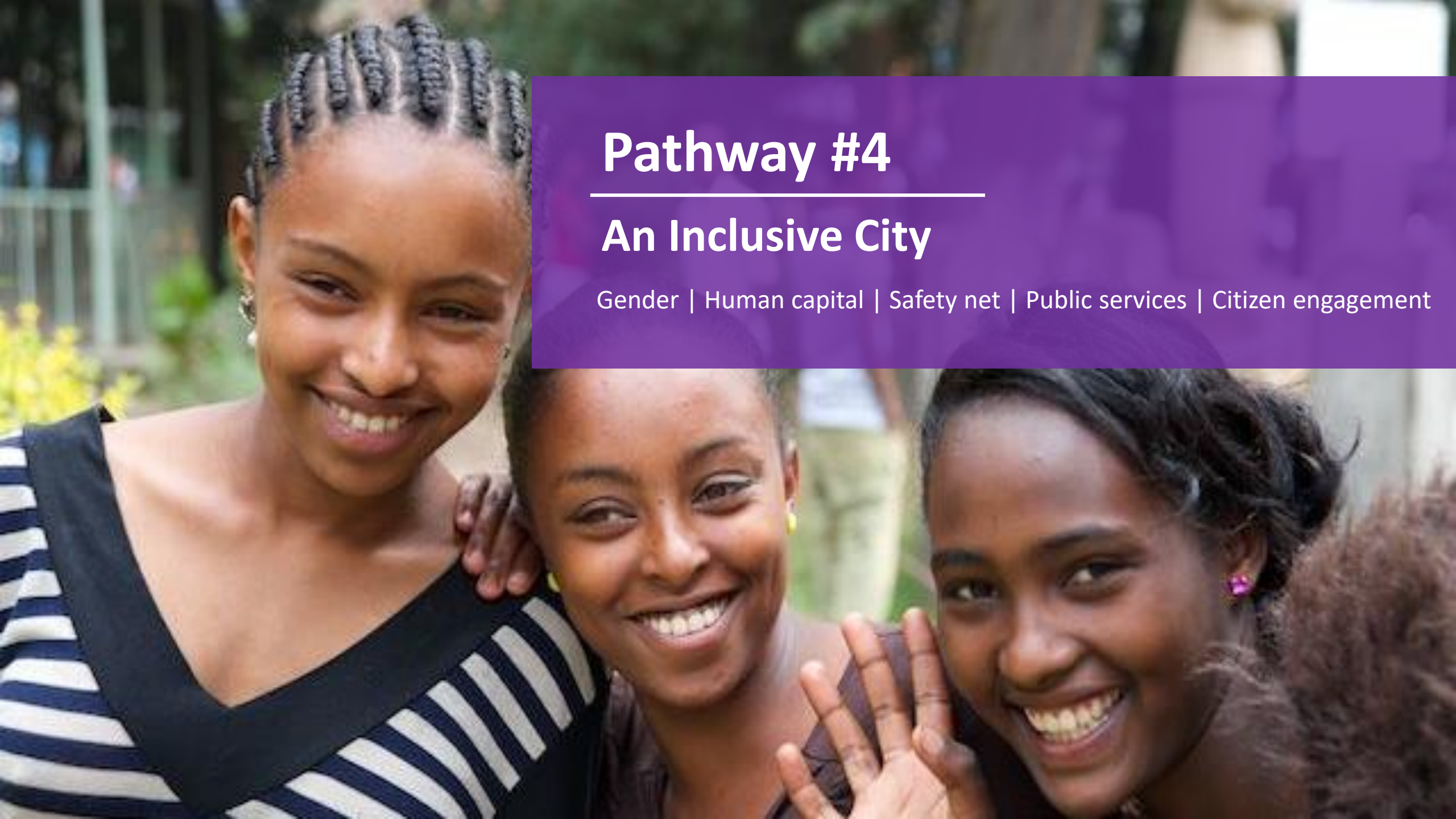
Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>13.1 Mainstream climate change mitigation and adaptation into city development planning</b>	<ul style="list-style-type: none"> <li>Promote green and low carbon city development planning</li> </ul>			S
	<ul style="list-style-type: none"> <li>Promote climate resilient city development planning</li> </ul>	- A study conducted on enhancing Addis capacities to better manage climate and disaster risks; TA on integrating the CRGE vision into Addis Ababa City	closed on-going	S
	<ul style="list-style-type: none"> <li>Improve institutional structure and processes to drive and coordinate climate action and engage key stakeholders</li> </ul>	- TA at national level incl. integrating Climate Resilient Green Economy (CRGE) Strategy into AA 10-year Dev. Plan	on-going	M



## For Sustainable City

### 13. Promote climate resilient green development

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>13.2 Foster disaster risk reduction and climate resilient infrastructure development</b>	<ul style="list-style-type: none"><li>Strengthen hazard assessment and mapping, disaster preparedness and response</li></ul>	- A study conducted on enhancing Addis capacities to better manage climate and disaster risks	closed	S
	<ul style="list-style-type: none"><li>Improve flood management infrastructure</li></ul>	- A hazard risk analysis for selected urban transport systems in Addis Ababa	draft	S,M
	<ul style="list-style-type: none"><li>Enhance planning and design of urban infrastructure with climate considerations</li></ul>		on-going	S



# Pathway #4

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## An Inclusive City

Gender | Human capital | Safety net | Public services | Citizen engagement





## For Inclusive City

14

Foster more and better jobs and social activities to **youths, women**

15

Reinforce **human capital, social safety net, and inclusion**  
in **public services**

16

Strengthen **citizen engagement**

**Short Term**

USD 236.7 mil

**Mid-long Term**

USD 457.5 mil





## For Inclusive City

### 14. Foster more and better jobs and social activities to youths, women

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>14.1. Promote urban youth-targeted jobs and social activities</b>	<ul style="list-style-type: none"><li>Support employment and social activity program for youths</li></ul>	<ul style="list-style-type: none"><li>- Investment in improving the incomes of the urban poor and the labor market inclusion of disadvantaged urban youth;</li><li>- A study to assess whether industrial park jobs are empowering and on wages and compensations in industrial parks</li></ul>	on-going closed	S,M
<b>14.2. Promote women-targeted jobs and social activities</b>	<ul style="list-style-type: none"><li>Support employment and social activity program for women</li></ul>	<ul style="list-style-type: none"><li>- Investment to increase the earnings and employment of MSEs owned or partly owned by the participating female entrepreneurs</li></ul>	on-going	S,M



## For Inclusive City

### 15. Reinforce human capital, social safety net, and inclusion in public services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>15.1 Improve equity in human development</b>	<ul style="list-style-type: none"> <li>Improve equity in learning</li> </ul>	Investment in providing Quality Enhancement and Assurance Package for O-class, offer school grant and textbooks to public schools, and continuous professional development of teachers	on-going	S,M
	<ul style="list-style-type: none"> <li>Improve equity in basic health services</li> </ul>			M
	<ul style="list-style-type: none"> <li>Support migrants to integrate socially and economically</li> </ul>			M
<b>15.2. Improve digital literacy</b>	<ul style="list-style-type: none"> <li>Design and pilot digital literacy projects</li> </ul>	Investment in nurturing digital entrepreneurship and innovation hubs in Addis Ababa	pipeline	M



## For Inclusive City

### 15. Reinforce human capital, social safety net, and inclusion in public services

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
15.3. Expand social safety net programs	<ul style="list-style-type: none"> <li>Expand and strengthen social safety net support programs</li> </ul>	Investment in improving income of targeted poor households and establish urban safety net mechanisms in 782 KETENAS , 11 KIFLE KETEMAS	on-going	S
	<ul style="list-style-type: none"> <li>Reinforce the design of social safety net program by integrating with other social programs</li> </ul>	A study on analyzing the implications of conflict, violence, and displacement in IDP-hosting areas as well as areas of IDP origins	closed	M
15.4. Promote inclusive design for public spaces inclusion in public infrastructure and services	<ul style="list-style-type: none"> <li>Develop inclusive design for and invest in public spaces</li> </ul>			S
	<ul style="list-style-type: none"> <li>Prioritize investment in public infrastructure focusing on unplanned and underserved areas</li> </ul>			M



## For Inclusive City

### 16. Strengthen citizen engagement

Initiatives	Actions	WB past/on-going intervention	Status	Timeframe
<b>16.1. Promote public participation and citizen engagement</b>	<ul style="list-style-type: none"><li>Strengthen citizen engagement mechanism</li></ul>			S
<b>16.2. Empower women in public planning and implementation</b>	<ul style="list-style-type: none"><li>Increase women's representation in public consultation and engagement</li></ul>			S

## **VII. Technical Annex II**

(The attached pdf for the 1<sup>st</sup> phase output:  
Addis Ababa Multi-sectoral Diagnostics)



## **VII. Technical Annex III**

# Government Advisory Task-force Team

Name	Role	Title	Unit
Abinet Ergando	Coordinator/Team Leader	Research and Capacity Building Director	AA Plan and Development Commission(AAPDCo)
Mesele Hagos	Member	Capacity Building Directorate Director	AA City Manager Bureau(AACM)
Mohammed Arab	Member	Fiscal Policy Study Senior Officer	AA Finance Bureau(AAFB)
Seble G/Selassie	Member	Kaizon Senior Expert	AA Revenue Bureau(AARB)
Esayas Ayele	Member	Transport Service Improvement Directorate	AA Transport Bureau(AATB)
Berihun Berhe	Member	Land Renewal Study Expert	AA Land Development and Management Bureau(AALDMB)
Ermias Wubet	Member	Planning and Budgeting Director	AA Housing Development and Administration Bureau(AAHDAB)
Anteneh Mengistu	Member	Advisor Research and Project Preparation Directorate Director	AA Job Creation and Enterprise Development Bureau(AAJCEDB)
Zerihun Amdemariam	Member	Director General	AA Land Holding Registration and Information Agency (AALHRIA)
Gomeju Taye	Member	Transport Specialist	AA Resilient Project Office(AARPO)
Tassew Negewo	Member	Export Facilitation Directorate	AA Investment Bureau(AAIB)



# Government Advisory Task-force Team

Name	Role	Title	Unit
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Walelegn Desalegn	Member	Deputy Commissioner	AA Environmental Protection and Greenery Development Commission(AAEPGDC)
Kirubel Moges	Member	Senior Consultant	AA Science and Technology Agency(AASTA)
Fasil Mamo	Member	Senior Project Monitoring and Evaluation Expert	AA Water and Sewerage(AAWSA) Authority
Ashenafi Tola	Member	Technical Adviser	AA Fire, Disaster Risk Management Commission
Dawit Nigussie	Member	Communication officer	AAPDCo
Dumessa Olkaba	Member	Economist/Researcher	AAPDCo

# Government Management Team (Addis Ababa City Administration)

Name	Role	Title	Unit
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Alem Assefa	Consultation	Environmental Protection and Green Development Commission Commissioner	AAEPGDC
Zerihun Abate	Consultation	AAWSA General Manager	AAWSA
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Nejiba Akmel	Consultation	Head of the Finance Bureau	AAFB
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# Government Management Team (Addis Ababa City Administration)

Name	Role	Title	Unit
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Alfiya Haji	Consultation	Press Secretarty Head, Mayor's Offic	AAMO
Jarso Goliso	Consultation	Deputy Bureau Head	AAHDMB
Tadesse Lemma	Consultation	Deputy Commissioner, AAPDCo	AAPDCo
Solomon Fisha	Consultation	Fire and Disaster Risk Management Commission Commissioner	Fire and Disaster Risk Management Commission
Konjit Debela	Consultation	Deputy City Manager	AA City Manager Office

# Government Management Team (Addis Ababa City Administration)

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Adane Lema	Consultation	PIU Member	AATB PIU
Alemayhu Hailu	Consultation	PIU Member	AATB PIU
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Timinit Eshetu	Consultation	CEO, Construction Enterprise	AAHDMB
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Yared Terefe	Consultation	Director	BOLSA
Abebech Tilahun	Consultation	T/Leader	BOLSA
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# Government Management Team (Addis Ababa City Administration)

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Yohannes Mitiku	Consultation	Ex-Bureau Head	
Demelash Kebede	Consultation	Ex-Construction Bureau Head	AACB
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# Federal Ministry

Name	Role	Title	Unit
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# Non-Government Organizations

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Eleni Kyrou	Consultation	Head of EIB Representation to Ethiopia and AU	European Investment Bank
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Mr. Shin	Consultation	Program Manager	KOICA
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Abel Estifanos	Consultation	Expert	UNDP
Haregewoin Bekele	Consultation	Expert	UN-Habitat
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# Academia, Research Institutes, Consultants

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Frew Mengistu(PHD)	Consultation	Senior Researcher/Assistant Professor	ECSU
Lisasnetwork Seleshi	Consultation	PHD Candidate	ECSU
Shewaye Mersha	Consultation	PHD Candidate	Kotebe Metropolitan University (KMU)
Alebel Bayru(PHD)	Consultation	Research Fellow	Ethiopian Research Development Institute(EDRI)
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Temesgen Walelign	Consultation	PHD Candidate	ECSU



# WB Project Team

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Arturo Ardila Gomez	Peer reviewer	Lead Transport Economist	ITRGK
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# WB Project Team

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Senidu Fanuel	Team Member	Sr Private Sector Specialist	EAEF1
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# WB Project Team

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## Images

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