

## AFRICA RISK CONSULTING

### Botswana Monthly Briefing January 2021

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#### Botswana Summary 12 January 2021

*President Mokgweetsi Masisi (2018-present) approves the extension of travel restrictions imposed under the emergency powers regulation from 4 January to 31 January. Botswana becomes the 46<sup>th</sup> African state to officially sign the memorandum of understanding of the China Belt and Road Initiative (BRI), which is expected to deepen mutually beneficial cooperation between Botswana and China. The Botswana government and the De Beers Group, the world's leading diamond company, have agreed to extend their sales agreement until the end of 2021 after the COVID-19 pandemic had hampered their negotiations. The government rescues the Civil Aviation Authority of Botswana (CAAB) from collapse after it runs out of cash.*

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#### Government enacts new COVID-19 restrictions ...

Health minister **Edwin Dikoloti** announced on 3 January that President **Mokgweetsi Masisi** (2018-present) had decided to extend restrictions on the movement of people based on evidence that the risks of **COVID-19** have increased in **Botswana**.<sup>1</sup> Masisi approved the extension of travel restrictions, imposed under the emergency powers regulation, from 4 January to 31 January.<sup>2</sup> The government decided on 24 December to impose a curfew from 7pm to 4am, effective from 24 December to 3 January, to limit the expected spread of infections ahead of the festive season. The new restrictions extend the regulations and establish daily curfew from 8pm to 4am. Essential workers are required to carry permits in order to travel during times when movement is restricted while the sale and consumption of liquor in public places are also suspended.<sup>3</sup>

The government also announced that the new strain of the COVID-19 virus, known as **501.V2**, has been detected in Botswana and continues to spread. The new strain was first reported in **South Africa** in mid-December and is reportedly much more easily transmissible than the first variant.<sup>4</sup> Dikoloti cautioned the public against disregarding COVID-19 protocols during the festive period, especially in light of the detection of the new strain.

There are fears that the new COVID-19 restrictions could add more stress to Botswana's already struggling economy. The COVID-19 outbreak was particularly difficult for the local business sector in 2020. The sector was left grappling for survival amid fears of financial collapse for both small and large businesses. The government is facing a P15 billion (\$1.3 billion) deficit for the 2020/21 financial year due to the impact of COVID-19 and has cut spending across parastatals, ministries, departments and projects.<sup>5</sup>

The economy contracted by an estimated 13.1% due to the COVID-19 impact on mining and production, which decreased by 36%; production in 2020 was 7.5 million carats mined against the 2019 value of 11.7 million carats.<sup>6</sup> The pandemic has wiped off 63% of half-year earnings of **Debswana Diamond Company**, the 50:50 joint venture between the Botswana government and the **De Beers Group of Companies**. Employees in the alcohol industry, Botswana's largest employer and

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<sup>1</sup> SABC News, 4 Jan 2021

<sup>2</sup> SABC News, 4 Jan 2021

<sup>3</sup> SABC News, 4 Jan 2021

<sup>4</sup> SABC News, 4 Jan 2021

<sup>5</sup> Mmegi, 25 Dec 2020

<sup>6</sup> Daily News, 22 Dec 2020

a high income generating business, are facing uncertain job security.<sup>7</sup> The imposed lockdowns have drastically reduced sales for many businesses, making survival difficult, as the majority of businesses can no longer afford commercial spaces in designated malls and complexes.<sup>8</sup> Many businesses are unable to survive as sales, inputs and raw materials could not be sourced to run at full capacity.<sup>9</sup> With an international ban on travel during the first half of the pandemic, the tourism industry struggled immensely with many businesses having to retrench their employees.

As if 2020 wasn't bad enough, Botswana in 2021 will face a more aggressive COVID-19 variant, VAT increases, a **Botswana Housing Corporation** rental hike, higher electricity tariffs and a possible new sugar tax, raised fuel levy, and fewer service job openings.<sup>10</sup> Given these challenges and developments within the country's business sector, market analysts predict Botswana's economy will take at least two years to bounce back.<sup>11</sup>

### Botswana joins China Belt and Road Initiative...

Botswana on 7 January became the 46<sup>th</sup> **African** state to officially sign the memorandum of understanding of the **China Belt and Road Initiative (BRI)**. The BRI is expected to deepen mutually beneficial cooperation between **China** and Botswana, open up new prospects, expand new fields, and help Botswana's infrastructure construction and national modernisation process.<sup>12</sup> China's President **Xi Jinping** (2012-present) proposed the BRI in 2013 as a strategy to revive the ancient silk road of past centuries. The vast transcontinental development project seeks to improve connectivity among nations in **Asia, Europe** and Africa by complementing infrastructural gaps, increasing foreign direct investment, expanding trade and ultimately reducing poverty.<sup>13</sup> The land-based projects are known as the "belt" while the "road" is the maritime routes that will connect China's southern provinces to south-east Asia and the east coast of Africa with ports and railways.<sup>14</sup> China has already invested \$1 trillion in projects including major infrastructure works in Africa and Central Asia.<sup>15</sup>

International affairs and cooperation minister **Lemogang Kwape** signed the memorandum during the courtesy call of China's foreign affairs minister, **Wang Yi**, to President Masisi.<sup>16</sup> Wang Yi's visit takes place in the context of China's 31-year tradition of foreign ministers undertaking their first official foreign visits of the year to select African countries in January. Wang Yi will also pay official visits to **Tanzania, Nigeria, Seychelles** and the **Democratic Republic of the Congo**. Wang Yi noted that China is committed to supporting the **African Union** Agenda 63 and will remain a strong ally of Botswana.<sup>17</sup>

Kwape praised China for supporting the agenda of developing countries within the **United Nations (UN)** system, noting that both countries are committed to ensuring an effective multilateral system that supports the attainment of the UN's **Sustainable Development Goals (SDGs)**.<sup>18</sup> Kwape cited areas such as development of infrastructure and human capital as assistance from which Botswana had benefited in its cooperation with China:

*"Furthermore, Botswana values China as a long term strategic partner and stands ready to explore opportunities for deeper economic cooperation particularly through direct*

<sup>7</sup> Daily News, 22 Dec 2020

<sup>8</sup> Daily News, 22 Dec 2020

<sup>9</sup> Daily News, 22 Dec 2020

<sup>10</sup> Mmegi, 8 Jan 2021

<sup>11</sup> Daily News, 22 Dec 2020

<sup>12</sup> South China Morning Post, 10 Jan 2021

<sup>13</sup> Quartz Africa, Sep 19 2019

<sup>14</sup> The Sydney Morning Herald, 12 May 2017

<sup>15</sup> The Sydney Morning Herald, 12 May 2017

<sup>16</sup> Daily News, 7 Jan 2021

<sup>17</sup> Daily News, 7 Jan 2021

<sup>18</sup> Daily News, 7 Jan 2021

*investment from China as well as market opportunities for the country for beef and tourism.”<sup>19</sup>*

President Masisi commented that relations between Botswana and China are premised on the **One China Policy** that will continue to inform and guide the articulation of relations as Botswana participates in the BRI.<sup>20</sup> Masisi expressed optimism that the signing of the memorandum will help Botswana attract foreign direct investment in the quest to reboot its battered economy in the wake of the COVID-19 pandemic.<sup>21</sup>

Analysts say Wang Yi’s tour of Africa is intended to cement China’s diplomatic and economic influence on the continent and repair frayed relations with certain countries.<sup>22</sup> China wishes to indicate that it is not taking Africa for granted, and as such has placed Wang Yi’s visit, as one of the country’s most senior representatives, as the first and one of the most important of the new year. This year in particular has offered the Chinese government an opportunity to ease tensions caused by growing concerns over debt and the discrimination of African citizens in the southern city of **Guangzhou** at the height of the outbreak of the pandemic in 2020.<sup>23</sup> China also no doubt wanted to use the trip to signal to African countries that it is still willing to fund infrastructure projects under the BRI despite concerns that the multi-billion scheme faces budget cuts.<sup>24</sup> Wang Yi signalled that China is ready to step up its military and security cooperation with the continent and is prepared to help Africa to enhance peacekeeping and counterterrorism capacity in a joint effort to build a secure continent.<sup>25</sup> The visit has also given Wang Yi an opportunity to update African leaders on issues of mutual and international concern, such as the ongoing pandemic, BRI cooperation, relations with the **United States** and its implications for the global economy, and issues around foreign aid and development assistance, climate change, peace and security.<sup>26</sup>

### **Government and De Beers agree one-year extension of diamond sales deal...**

The Botswana government and the **De Beers Group**, the world's leading diamond company, have agreed to extend their sales agreement governing diamonds from their 50:50 joint venture, **Debswana**, by one year after the COVID-19 pandemic hampered their negotiations.<sup>27</sup> The deal is significant with Debswana being the world's leading diamond producer by value. The 10-year agreement concluded in September 2011 was due to lapse at the end of 2020, but ahead of that, officials from both sides had engaged in negotiations and laid out the agenda for the talks. The new agreement provides short-term stability while the two sides reach a final long-term deal.

The agreement between the two parties governs the conditions regarding the sale of diamonds from Debswana through the De Beers process.<sup>28</sup> The previous talks delivered by far the best deal for Botswana, with the migration of the multibillion dollar diamond activities from **London** (UK) to **Gaborone**. The extended deal also secured an independent pricing avenue for Botswana via the establishment of the state-owned **Okavango Diamond Company (ODC)**.<sup>29</sup> De Beers said that both sides had agreed to the extension while discussions continue:

*“Due to the logistical challenges presented by the pandemic, the Government of the Republic of Botswana and De Beers Group have agreed to extend their existing contract for the sale of Debswana’s rough diamond production until the end of 2021... The extension, which will*

<sup>19</sup> Daily News, 7 Jan 2021

<sup>20</sup> Daily News, 7 Jan 2021

<sup>21</sup> Daily News, 7 Jan 2021

<sup>22</sup> South China Morning Post, 10 Jan 2021

<sup>23</sup> South China Morning Post, 10 Jan 2021

<sup>24</sup> South China Morning Post, 10 Jan 2021

<sup>25</sup> South China Morning Post, 10 Jan 2021

<sup>26</sup> Mmegi, 5 Jan 2021

<sup>27</sup> Mmegi, 18 Dec 2020

<sup>28</sup> Mmegi, 18 Dec 2020

<sup>29</sup> Mmegi, 18 Dec 2020

*extend the terms of the existing agreement, will provide further time for discussions regarding the contract renewal.”<sup>30</sup>*

While the finer details of the final agreement are not yet officially known, insiders told **BusinessWeek** that the negotiations would most likely focus on a higher profit split for the government from Debswana revenues, a greater percentage of supply to the ODC, greater capital commitment by De Beers and focus on legacy around skills development.<sup>31</sup> Insiders also said that De Beers could “*comfortably and profitably*” run on a 97:3 profit split with the government.<sup>32</sup> This is higher than the current split which gives Botswana 81% of earnings from Debswana through royalties, taxes and dividends.

President Masisi commented that the country will seek a greater presence in the diamond pipeline, adding more value from mining and manufacturing:

*“We need to move further up the pipeline to jewellery manufacturing and retail... Participation at these upmarket levels of the pipeline, however small, will go a long way in promoting the development of Gaborone as a diamond city and Botswana as the number one diamond destination.”<sup>33</sup>*

Some analysts have commented that previously the government leveraged to secure concessions from De Beers, however the declining resources at the various local mines mean that the current deal could be the last where Debswana plays its hand to its fullest extent.<sup>34</sup>

### **Civil aviation authority averts shutdown as Air Botswana returns to regional skies...**

The Botswana government has pulled the **Civil Aviation Authority of Botswana (CAAB)** back from collapse after the CAAB ran out of cash and decided to cease operations on 31 December.<sup>35</sup> The decision to cease operating would have meant no aircraft could land or take off in Botswana, dealing a heavy blow to nearly all sectors of the economy, as well as investor confidence.<sup>36</sup> Government will reportedly support the cash-strapped parastatal beyond December 2020. Transport and communications minister **Thulaganyo Segokgo** said on 23 December that he was aware of the difficulties the CAAB faced as a result of airports’ closure earlier in the year:

*“... there was no air travel which is fundamentally the basis on which they get their revenue. So they had no revenues, close to P100,000 (\$9,000) where normally they collect up to P7m (\$630,572)... We have been supporting them so that they can meet their obligations in terms of paying their fees. We will continue to do so and find a means to support them.”<sup>37</sup>*

Segokgo noted that the CAAB has always operated with higher expenditure than it collects, supported by government subsidies. When revenues fell, subsidies alone could not sustain the CAAB.<sup>38</sup> Analysts say that while the crisis has been averted in the short term, the situation could create discomfort and stress among critical employees who are required to look after the country’s air safety.<sup>39</sup> Some argue that the CAAB should be deemed a strategic organisation in regulating aviation, which in turn anchors economic activity.<sup>40</sup> Analysts question how it was possible that such a critical organisation was allowed to close at all.

<sup>30</sup> Mmegi, 18 Dec 2020

<sup>31</sup> Mmegi, 18 Dec 2020

<sup>32</sup> Mmegi, 18 Dec 2020

<sup>33</sup> Mmegi, 18 Dec 2020

<sup>34</sup> Mmegi, 18 Dec 2020

<sup>35</sup> Mmegi, 25 Dec 2020

<sup>36</sup> Mmegi, 25 Dec 2020

<sup>37</sup> Mmegi, 25 Dec 2020

<sup>38</sup> Mmegi, 25 Dec 2020

<sup>39</sup> Mmegi, 25 Dec 2020

<sup>40</sup> Mmegi, 25 Dec 2020

Meanwhile, national airline **Air Botswana** returned to regional skies in the week starting 14 December, with flights to **Cape Town** (South Africa), **Lusaka (Zambia)** and **Harare (Zimbabwe)**.<sup>41</sup> Flights were suspended in March amid a global ban in response to the outbreak of the COVID-19 pandemic.<sup>42</sup> Since then, the national airline has struggled, with parliament approving a P100m (\$9m) bailout to keep it afloat. Air Botswana has experienced running losses since 2008 due to an ageing fleet, high maintenance costs, equipment failure, route redundancy and pressure from competition, and cut staff in 2017.<sup>43</sup> Air Botswana plans to rationalise in 2021 to enhance operation efficiency and align staff with the size of its fleet.<sup>44</sup>

## Planner

4-22 Feb 2021 **Gaborone (Botswana)** Debate on budget speech;  
 2021 **Morupule (Botswana)** Expected commissioning of **Morupule Coal Mine** expanded mine;  
 March 2023 **(Botswana)** End date of the **National Development Plan 11 (NDP11)**  
 2024 **(Botswana)** Presidential elections

## Chronology

8 Jan 2021 **Gaborone (Botswana)** *Sunday Standard*. **Botswana Democratic Party (BDP)** communication and international relations chairperson **Kagelelo Banks Kentse** says former president **Ian Seretse Khama** has no moral authority to attack the BDP, and cannot live with the reality that he is no longer president;

7 Jan 2021 **Gaborone (Botswana)** *Mmegi*. The **Botswana Football Association (BFA)** will bid to be only the third **Southern African** country to host the **Africa Cup of Nations** finals in 2027;

7 Jan 2021 **Gaborone (Botswana)** *Daily News*. Acting police commissioner **Dinah Marathe** says the police are committed to ensuring compliance with curfew throughout the country;

7 Jan 2021 **Gaborone (Botswana)** *Sunday Standard*. Botswana joins the **China Belt and Road Initiative**;

5 Jan 2021 **Gaborone (Botswana)** *Daily News*. Finance and economic development ministry says President **Mokgweetsi Masisi** has approved recommendations to maintain the pula basket weights at 45% **South African** rand and 55% Special Drawing Rights (SDR), and continue to implement a downward rate of crawl of 2.87% in 2021;

5 Jan 2021 **Gaborone (Botswana)** *Sunday Standard*. The **Botswana Unified Revenue Service (BURS)** announces that **Tlokweng Border Gate** is closed until further notice due to **COVID-19** precautions;

4 Jan 2021 **Shoshong (Botswana)** *Mmegi*. Opposition **Umbrella for Democratic Change (UDC)** member of parliament for **Shoshong, Aubrey Lesaso**, has reportedly quit the opposition to join the ruling **Botswana Democratic Party (BDP)**;

3 Jan 2021 **Gaborone (Botswana)** *Sunday Standard*. Health minister **Edwin Dikoloti** announces that the new **501.V2** strain of **COVID-19** has been detected in Botswana;

3 Jan 2021 **Gaborone (Botswana)** *Sunday Standard*. President **Mokgweetsi Masisi** extends restriction on movement from 4 January to 31 January, with curfew in effect from 8pm to 4am daily;

<sup>41</sup> Source, Air Botswana consultant, Gaborone

<sup>42</sup> Source, Air Botswana consultant, Gaborone

<sup>43</sup> Mmegi, 18 Dec 2020

<sup>44</sup> Mmegi, 18 Dec 2020

2 Jan 2021 **Gaborone (Botswana) Mmegi**. Transport and communications minister **Thulagano Segokgo** confirms seven wagons of a **Botswana Railways** train hauling 32 wagons loaded with soda ash derailed in Gaborone;

1 Jan 2021 **Gaborone (Botswana) Daily News**. The **Water Utilities Corporation (WUC)** warns the public to be on high alert around **Shashe, Letsibogo, Ntimbale** and **Nywane** dams, which have reached their full capacity levels, and are at risk of flooding;

31 Dec 2020 **Gaborone (Botswana) Sunday Standard**. **Botswana Police Service (BPS)** acting public relations officer **Near Bagali** says the BPS has deployed more police officers to work on the ground in anticipation of non-compliance with **COVID** restrictions during the New Year festivities period;

30 Dec 2020 **Gaborone (Botswana) Sunday Standard**. In a joint press statement in the aftermath of the fatal shooting of three **Namibian** nationals and one **Zambian** national on 5 November by the **Botswana Defence Force (BDF)**, the heads of state of **Botswana** and **Namibia** announce that a joint investigation has been concluded and is under consideration by both governments;

25 Dec 2020 **Gaborone (Botswana) Mmegi**. The government has bailed out **Civil Aviation Authority of Botswana (CAAB)** after it ran out of cash and made a decision to cease operating on 31 December;

24 Dec 2020 **Gaborone (Botswana) Mmegi**. Health minister **Edwin Dikoloti** says **Global Adult Tobacco Survey (GATS)** report shows 240,000 adults aged 15 and above (17.6%) use tobacco;

24 Dec 2020 **Gaborone (Botswana) Mmegi**. Government decides to impose curfew from 7pm to 4am, effective 24 December 2020 to 3 January 2021;

23 Dec 2020 **Gaborone (Botswana) The Monitor**. The **Botswana Police Service (BPS)** has charged 36,000 people across the country for violating the regulations for wearing masks properly;

24 Dec 2020 **Gaborone (Botswana) Mmegi**. The Botswana government and diamond mining company **De Beers** agree to extend their sales agreement governing diamonds from **Debswana** by one year after the **COVID-19** outbreak hampered negotiations;

23 Dec 2020 **Gaborone (Botswana) Mmegi**. **Air Botswana** says its revised fares are affordable and, in the case of some routes, can compete with the cost of fuelling a vehicle for the trip;

23 Dec 2020 **Foley (Botswana) Daily News**. President **Mokgweetsi Masisi** inspects damage caused by recent torrential rains that led to temporary closure of **Motloutse bridge** at **Foley** village;

21 Dec 2020 **Gaborone (Botswana) The Monitor**. Botswana launches **Space Orbit Programme** spearheaded by **Botswana International University Of Science And Technology (BIUST)**, initially targeted to mine data for improvement of Botswana's tourism and agriculture industries;

21 Dec 2020 **Foley (Botswana) Sunday Standard**. Floods displace a railway line at **Foley** village;

21 Dec 2020 **Gaborone (Botswana) Daily News**. Immigration and citizenship minister **Caroline Okello-Wengi** says the government will upgrade seven borders – **Ramatlabama, Ramokgwebana, Pioneer Gate, Mamuno, Tlokweng, Martin's Drift, and Kazungula Ferry** – in the next three years to be one-stop border posts and improve ease of doing business;

21 Dec 2020 **Gaborone (Botswana) Mmegi**. Opposition leader **Dumelang Saleshando** takes attorney general and **National Assembly Speaker Phandu Skelemani** to court challenging the decision to suspend him from the House in July 2020;

21 Dec 2020 **Gaborone (Botswana)** *Business Week*. Newly approved **Integrated Resource Plan (IRP)** will see renewable energy projects make up 81% of all new electricity generation developed or procured by government in the next 20 years;

20 Dec 2020 **Gaborone (Botswana)** *Mmegi*. The **United States Geological Survey (USGS)** reports an earthquake of 3.6 magnitude in Gaborone;

18 Dec 2020 **Gaborone (Botswana)** *Mmegi*. **Greater Gaborone Zone** residents hurriedly exit the **COVID-19** hotspot, fuelled by speculation that President **Mokgweetsi Masisi** will announce new restrictions that will hinder their Christmas travels;

18 Dec 2020 **Gaborone (Botswana)** *Mmegi*. **Copyright Society of Botswana (COSBOTS)** distribution reveals that foreign content continues to enjoy massive royalties from Botswana's public broadcasters; the current quota is 60/40, where foreign content gets 60% of airplay and local songs net 40%;

18 Dec 2020 **Tonota (Botswana)** *Mmegi*. Tonota legislator **Pono Moatlhodi** returns to his previous party, the **Botswana Democratic Party (BDP)**, after quitting the **Botswana National Front (BNF)** and the **Umbrella for Democratic Change (UDC)**;

16 Dec 2020 **Gaborone (Botswana)** *Mmegi*. Pupils have performed satisfactorily in the primary school leaving examination noting a slight decline of just under 1% despite learning disruptions from schools closing as a result of the **COVID-19** outbreak in Botswana;

15 Dec 2020 **Gaborone (Botswana)** *Business Week*. **Botswana Railways (BR)** plans to build more malls through its subsidiary, **JTTM Properties**, as its railway business continues to underperform, suffering a P58m (\$5.2m) loss last year;

15 Dec 2020 **Gaborone (Botswana)** *The Monitor*. Local government and rural development minister **Eric Molale** prevails in court against two former **Botswana Energy Regulatory Authority (BERA)** board members;

16 Dec 2020 **Gaborone (Botswana)** *Mmegi*. Investment, trade and industry minister **Peggy Serame** says Botswana owes no apology for building its manufacturing sector by protecting certain products such as bottled water and baked goods from cheaper imports;

14 Dec 2020 **Gaborone (Botswana)** *Mmegi*. **Bank of Botswana (BoB)** (central bank) expects inflation to quicken and cross the 3% mark in the second quarter of 2021 due to recent increases in postal tariffs, public transport fares and fuel prices;

15 Dec 2020 **Gaborone (Botswana)** *The Monitor*. A Statutory Instrument release revokes government's decision to limit the cost of **COVID-19** tests to P500 (\$45), announced on 11 December, ordering all accredited health facilities to comply;

14 Dec 2020 **Malaka-Lecheng (Botswana)** *Mmegi*. **Malaka-Lecheng** ward councillor **Pinny Morupisi** has resigned from the ruling **Botswana Democratic Party (BDP)** to join the **Botswana National Front (BNF)**;

14 Dec 2020 **Malaka-Lecheng (Botswana)** *Mmegi*. 117,000 companies have been removed from the **Companies and Intellectual Property Authority (CIPA)** register after the 2 December deadline to re-register on the **Online Business Registration System** elapsed;

11 Dec 2020 **Gaborone (Botswana)** *Mmegi*. Leading local artists including **Vee, ATI, Franco** take to the streets in protest, claiming that politicians who engaged them in the October 2019 political campaign to draw crowds at political rallies are now ignoring their pleas to reopen the entertainment industry;

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