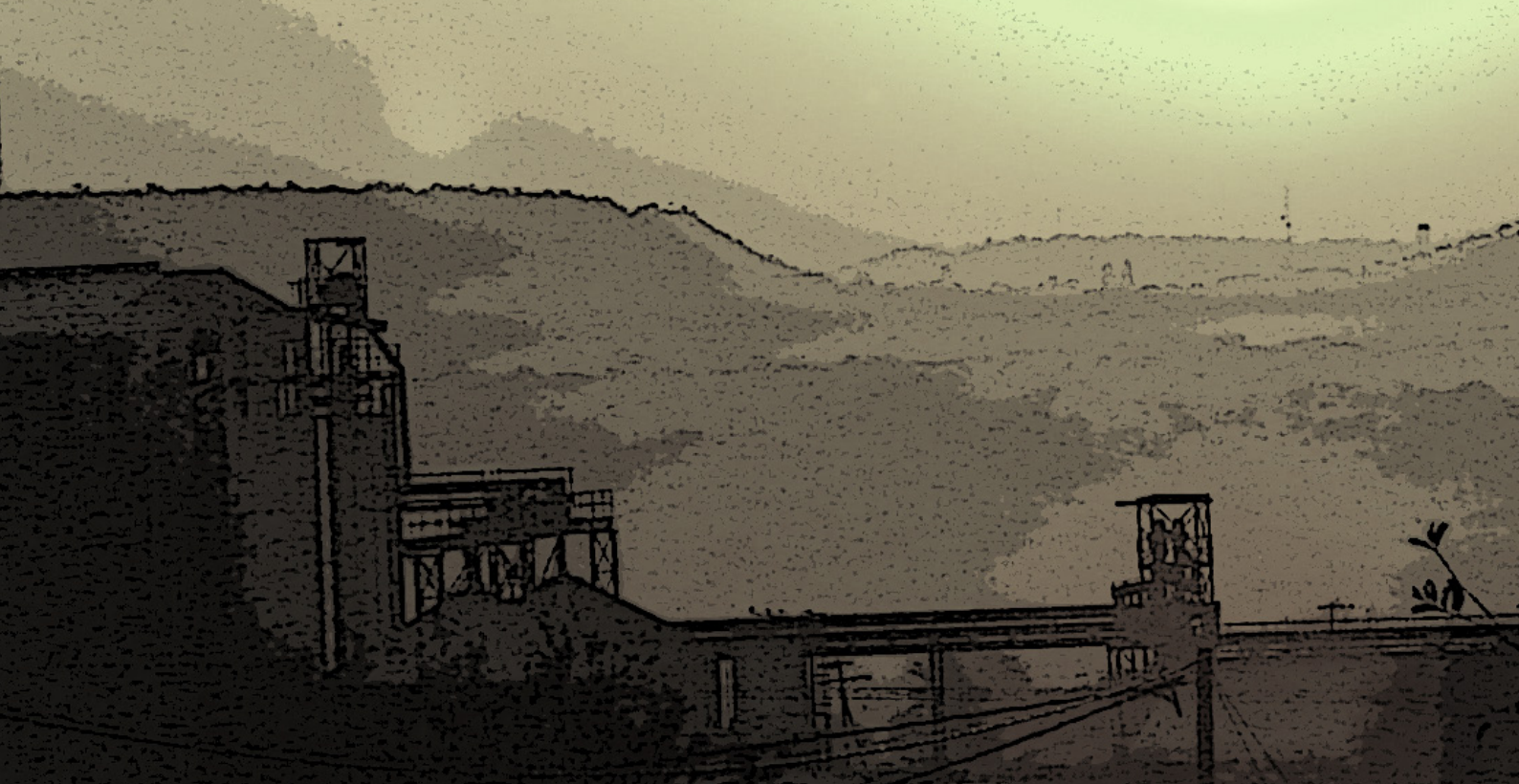


DISCUSSION PAPER 6/2015

GETTING UNSTUCK

Botswana's Economic Diversification Challenge

Leungo Motlhabane



Strengthening Africa's economic performance



GETTING UNSTUCK

Botswana's Economic Diversification Challenge



Contents

Executive Summary	3
Introduction	4
Impact of Diamonds	5
Leadership and Governance	7
Economic Diversification	8
Diamonds are not Forever: Efforts to Diversify	10
Political Will..	12
EDD Strategy	12
Doing Business.	13
Skills, Productivity and Entrepreneurship..	15
Conclusions	16
Endnotes	17

About the Author

Leungo Motlhabane is the former Machel Mandela Intern at the Brenthurst Foundation. Born in Botswana, Leungo is completing her M.A. at the University of Cape Town.

Published in October 2015 by The Brenthurst Foundation

E Oppenheimer & Son (Pty) Ltd
PO Box 61631, Johannesburg 2000, South Africa
Tel +27-(0)11 274-2096 · Fax +27-(0)11 274-2097
www.thebrenthurstfoundation.org

All rights reserved. The material in this publication may not be reproduced, stored, or transmitted without the prior permission of the publisher. Short extracts may be quoted, provided the source is fully acknowledged.

Layout and design by Sheaf Publishing, Benoni.

Executive Summary

In less than a year, on 30 September 2016, Botswana will celebrate 50 years of independence. This milestone presents a time for celebration, for critical reflection and for mapping the road ahead. Botswana has come a long way: from being one of the poorest countries in sub-Saharan Africa at independence to recording the highest economic growth rates on the continent, reaching upper-middle income status and ranking in the top four across most indices of African governance and human development for the past decade.

Yet Botswana is stuck. Diamonds, the stronghold of the economy, is an exhaustible resource that is likely to be depleted in the next 20–30 years. Unable thus far to move beyond dependence on a single commodity to a more resilient, diversified economy, stark questions are being asked about the future economic growth and prosperity of the country. Such concerns are compounded in the current environment, where inability to access reliable electricity and water has become a serious brake on business investment and growth.

This Discussion Paper examines Botswana's efforts at economic diversification and potential explanations as to why the 'diversification curse' has found a home in Botswana. Drawing on numerous interviews with representatives of both the public and private sector in Botswana, as well as secondary sources, the first section of the paper traces Botswana's development path from independence. Its success in avoiding the acute failings of most resource-dependent African states is typically attributed to its small, relatively homogenous population, its abundant natural resource wealth, institutional capacity and quality of leadership. Revenues generated

from the diamond industry were invested into socio-economic developments for the provision of basic social services and the establishment of various parastatals. These investments were designed to assist and empower citizens in the start-up and financing of businesses that would, in the long-term, result in a diversified economy. That diversification failed to result led to the establishment of the Botswana Economic Advisory Council (set up in 2005) and the Economic Diversification Drive strategy (implemented in 2011).

Though well-intentioned, they too have not produced the desired outcomes. Key factors outlined in the Paper include insufficient political will, poor skills development, inadequate focus on improving 'doing business' indicators and a dependency mind-set. Of critical importance is the need for government to bridge its voluble political rhetoric on diversification with purposeful action and implementation on the ground. In terms of doing business, structural changes to the business environment are imperative if Botswana is to get 'unstuck'. Its traditional industries – agriculture, mining and tourism – provide real prospects for developing key business linkages that could kick-start wider diversification.

Unlike much of Africa, Botswana can draw on its own successful experience of sound resource management and prudent development choices to renew the country's economic landscape and prospects. Besides the joint commitment of government and business to make diversification a reality, much will hinge on whether Botswana as a whole step up and take ownership of the process.

Introduction

Botswana (then the Bechuanaland Protectorate), a landlocked and semi-arid sub-Saharan African country, gained its independence from the British in September 1966. It was protected by the British from German or Boer invasion and thus experienced limited, non-extractive colonial rule. The British did not take much and did not leave much behind either; Bechuanaland had very little to offer at that time and was not worth investing in. At independence, it was one of the poorest countries in the region – its gross domestic product (GDP) per capita was just above US\$80, its industrial sector was almost non-existent, literacy rates were low, infrastructural developments were scarce and Botswana depended on subsistence farming, government employment or work in the mines and farms of South Africa. These socio-economic conditions suggested a bleak picture for the future of Botswana.

The discovery of diamonds in the late 1960s marked a fundamental turning point in the country's history. An economy that was once driven by beef exports to South Africa and the European Economic Community changed course; mineral exports, specifically diamond exports, became the backbone of the economy. Within a few decades, Botswana gained its reputation as 'Africa's success story', the country which bucked the African trend of endemic government corruption, rent-seeking and succumbing to the resource curse.¹

The discovery of diamonds in the late 1960s marked a fundamental turning point in the country's history

Between 1966 and 1999, Botswana recorded the world's highest rate of economic growth, and according to World Bank standards, ascended to upper-middle income status. From just over US\$80 in 1966, today GDP per capita has risen to approximately US\$7 315.² Before diamond exports flourished, agricultural and industry sectors dominated economic activity. In 1960, agriculture's value added share of GDP was 43 per cent in comparison to the 13 per cent of industry. By the 1980s, industry

overtook agriculture, contributing 51 per cent of GDP against agriculture's 15 per cent.³ Diamond exports account for the dramatic expansion of industry's share of GDP – in 1991 diamonds made up 79 per cent of exports and by 2001, 85 per cent of exports in comparison to the once flourishing beef industry which in 2001 only contributed a mere 3 per cent to GDP.⁴

How Botswana forged a different path to much of the rest of the continent is worth examining in detail

Unlike in most of Africa, these numbers were translated into real progress in development. Across most indices of governance and human development, Botswana has ranked at or near the top in sub-Saharan African rankings. Botswana's success is generally attributed to its small, relatively homogenous population, its abundant natural resource wealth, institutional capacity and quality of leadership.

How Botswana forged a different path to much of the rest of the continent is worth examining in detail – for the lessons it offers other commodity-dependent states in Africa still lagging behind, to be sure. Perhaps even more importantly, however, it reveals clues to why Botswana now finds itself stuck, unable to diversify its economy and potentially standing at another crossroads in its development history, where the costs of 'business as usual' could be very grave for the country's future growth and prosperity.

In some respects, Botswana might have been expected to be where Mauritius is today, a country which has achieved an impressive level of economic diversification through various innovative policy instruments and adaptations by both government and private sector. Botswana shares similar characteristics – macroeconomic stability, good governance and accumulated revenues from the diamond industry – but its diversification efforts have not taken off nearly as successfully as Mauritius. So why has the 'diversification curse', as one might describe it, found a home in Botswana?

This Discussion Paper offers some tentative explanations why, drawing on numerous interviews conducted in Botswana with representatives of both the public and private sector, as well as secondary sources. Botswana's failure to diversify is recognised by most as one of the principal challenges facing the country, though numerous questions arose around, in particular, 'ownership' of the process.

Botswana has no shortage of sound frameworks and policies to drive diversification, yet its acute failure to effectively implement speaks to a host of cultural, governance and technical issues that are highlighted below. The first part of this Paper outlines the key factors responsible for Botswana's success to date, then proceeds to address the key hurdles to overcoming the 'diversification curse'.

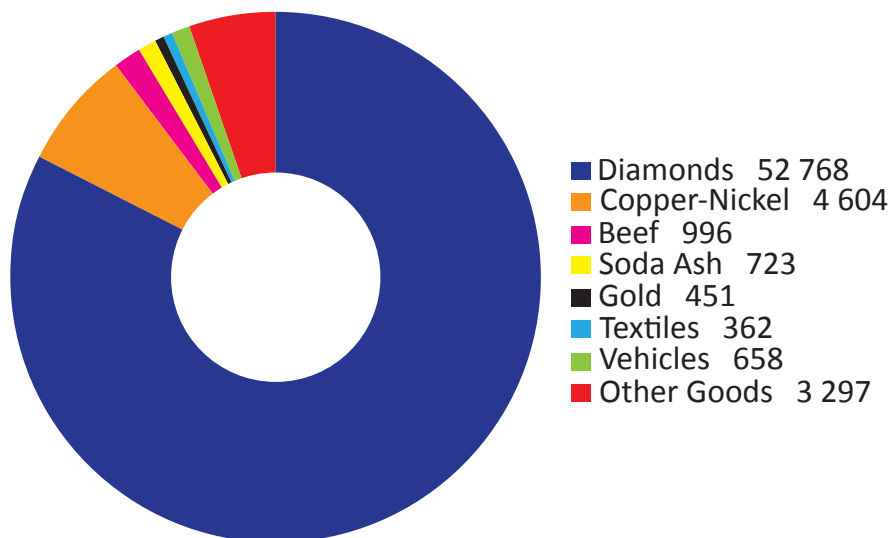
Impact of Diamonds

Soon after the discovery of diamonds, a 50/50 partnership was formed between the government of Botswana and De Beers – Debswana. Established in 1969 to begin the diamond production process, currently it operates four diamond mines – Jwaneng, Orapa, Letlhakane and Damtshaa. Jwaneng is the world's richest diamond mine by value and Orapa

has one of the largest kimberlite pipes in the world.⁵ Together they have made Botswana the largest diamond producer by value.

In 2013, Debswana produced 22.7 million carats generating 52.8 billion Pula (approximately US\$6.3 billion) worth of exports which accounted for 82.6 per cent of Botswana's total exports.⁶

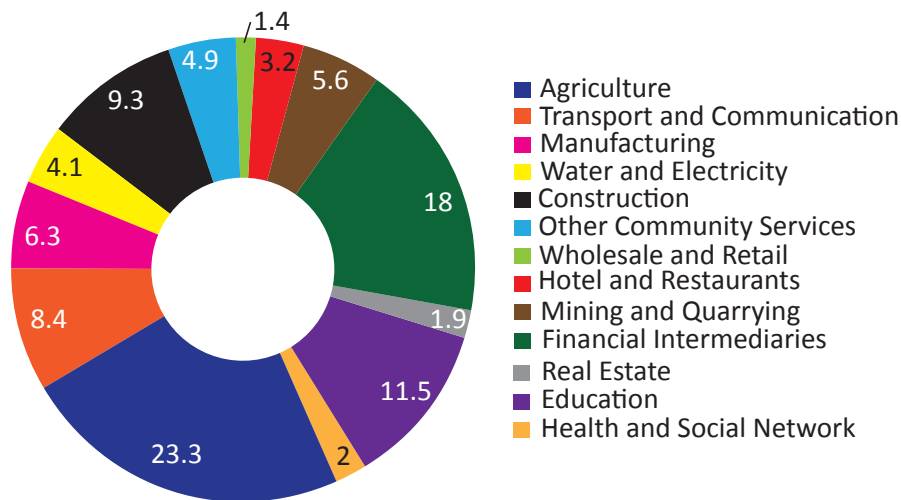
Figure 1: Total Exports 2012–2013 (millions of Pula)



Source: Bank of Botswana Annual Report 2013

By June 2014, diamonds accounted for 85.8 per cent of total exports⁷ and mining's percentage share of GDP rose to 22.9 per cent from 21.9 per cent in 2013.⁸ According to the Ministry of Finance and Development Planning, government's total revenues and grants at the end of December 2014 amounted to 39.1 billion Pula due to a significant increase in mineral royalties and dividends. For the 2014/2015 year, mineral revenue is expected to increase from 13.3 billion to 15.2 billion Pula, making up

30.4 per cent of total government revenue.⁹ In his 2015 Budget Speech, Finance and Development Planning Minister Kenneth Matambo informed the nation that government's projected total revenues and grants for the 2015/2016 year would amount to 55.38 billion Pula of which mineral revenues would make up 34.4 per cent.¹⁰ These figures are evidence of mining's significant role in generating revenues for government.

Figure 2: Private and Parastatal Employment Distribution by Industry, September 2010 (Percentages)

Source: Statistics Botswana, Labour Statistics 2010

Due to its capital intensive nature, however, it isn't nearly as significant in generating employment. In September 2010, mining and quarrying comprised only 5.6 per cent of total private and parastatal employment. To put this into perspective, Debswana's workforce in 2013 only amounted to 5 167 employees.¹¹

Given its low labour capacity, other concerns have emerged over the general impact and trickle-down effect of diamond revenues into social aspects of development and the improvement of Botswana's livelihoods.

With rapid economic growth driven by diamond exports, rising government revenues and foreign exchange reserves were invested into basic social services and the establishment of parastatals like Botswana Water Utilities (BWU), Botswana Power Corporation (BPC), Botswana Housing Corporation (BHC) and the National Development Bank (NDB).¹²

The government of Botswana, under the watchful eye of the Bank of Botswana, enforced macroeconomic policies that stabilised economic growth, avoided external debts through the accumulation of foreign reserves and controlled fiscal expenditure guided by National Development Plans.¹³ These factors mitigated chances of experiencing a resource curse.¹⁴

With the agricultural sector accounting for approximately 40 per cent of GDP in the 1960s, and beef exports the majority of that share, the

government established Botswana Meat Commission (BMC) which was in charge of slaughtering processes and marketing Botswana's prime beef abroad. To provide a market for locally produced crops including cereals, seeds, and beans, and to ensure that adequate supplies existed for sale to customers at affordable prices, Botswana Agricultural Marketing Board (BAMB) was set up in 1974. Both BMC and BAMB would serve to promote growth in production and supply of goods within the agricultural sector.¹⁵

Commercial and industrial development was to be advanced in 1970 through the Botswana Development Corporation (BDC) by providing financial assistance to citizens with commercially viable projects. In 1982, a system of grants called the Financial Assistance Policy (FAP) was developed to assist with the setting up or expanding of small, medium and large private sector businesses in manufacturing, agriculture and tourism. The main objectives of the FAP was creating sustainable employment and skills development, producing goods for exports or import substitution, diversification of the economy and citizen empowerment.¹⁶ The FAP is testament to the government's early attempts to boost non-mining sectors.

Taking over from FAP, the Citizen Entrepreneurial Development Agency (CEDA) was set up in 2001 to provide financial and technical support for business development with a view to promote viable and sustainable citizen owned business enterprises.

Names and establishment dates seem to be the only difference between BDC and CEDA.

Next was the Local Enterprise Authority (LEA) in 2004. LEA was established to promote and facilitate entrepreneurship and small, micro and medium enterprises (SMMEs) through targeted interventions and services. Most of its services are geared towards the youth, women and the unemployed; the most vulnerable groups in Botswana and most countries. By 2010, the government had established myriad development agencies, policies and programmes to facilitate and encourage citizen empowerment and business ownership in all sectors. In due time the Botswana Investment and Trade Centre (BITC) was established with a mandate to attract foreign investment through export promotion and development. BITC also works to promote locally manufactured goods to regional and international markets and to manage Brand Botswana abroad.

These parastatals with their accompanying policies and programmes are safety nets and silver platters giving easy access for resource acquisition to empower citizens and increase participation in the private sector, to create employment opportunities and business-friendly environments and to attract foreign investors to Botswana. These efforts, the

alphabet soup of development initiatives, highlight (some of) government's attempts to diversify economic production and revenues from sectors beyond mining and to account for every aspect of economic development. In addition, the government continues to invest heavily in social developments. The ministries of Education and Skills Development, Health and Local Government and Rural Development will obtain the largest share of government's 2015 budget. The biggest share of the budget, 10.31 billion Pula or 28.1 per cent, will go towards education and skills development, demonstrating government's commitment to 'supporting human capital development'.¹⁷ Healthcare will receive 5.67 billion Pula or 15.5 per cent primarily to deal with HIV/AIDS and 5.2 billion Pula or 14.2 per cent to local government and rural development to cover social grants, social protection programmes and allowances for destitutes and people living with acute disabilities.¹⁸ These efforts are crucial during a time of escalating income inequality (Botswana has a gini coefficient of 0.61), unemployment (officially at 17.8 per cent) and a persistent HIV/AIDS pandemic – about 320 000 people are living with HIV (this figure does not include those affected by HIV/AIDS).¹⁹

Leadership and Governance

Sound leadership and good governance contributed significantly to Botswana's post independence economic success. Botswana's first president, Sir Seretse Khama, and his vice president, Sir Ketumile Masire, worked to strengthen the state and its institutions to create an environment that would propel firstly, the authority of the state and secondly, good economic policies. One such keystone policy was the transfer of land and mineral rights to the state, ensuring that no chief or tribe would have a hold on the nation's wealth.²⁰ The state's hold on land and mineral rights, Botswana's multiparty democracy and prudent financial behaviour restricted opportunities to use diamond revenues to engage in rent-seeking and corruption. Perhaps not surprisingly, one of its ex-presidents, Festus Mogae, received the Ibrahim Prize for Achievement in African Leadership and the country has ranked in the top four of the Ibrahim

Index of African Governance every year since it was established in 2007.²¹

Governance and democratic practices date back to traditional Tswana culture of the *kgotla* system. The *kgotla* is a place where the chief and members of a community come together to discuss issues pertaining to their community. They serve as public forums and channels of accountability. Today, the president visits and uses *kgotlas* as consultative and public participation arenas. In addition to the use of *kgotlas*, the government has introduced *pitsos*²² to discuss various issues ranging from budget, water, construction, women in sport and youth empowerment. Despite growing criticism about President Ian Khama's leadership and governance style, confidence in the country's political stability and democratic institutions is still robust.²³ Political dominance by the Botswana Democratic Party is receding as

seen in the recent October 2014 elections where the Botswana Movement of Democracy showed its expanding influence and support by drastically reducing the BDP's victory margins. Changes in the political landscape make for a potentially volatile period in Botswana's democratic history, but there is confidence that it will not unduly shake short-term political and economic stability.

On the face of it, Botswana presents an almost ideal development story – diamonds are discovered after independence, government revenues and GDP increase dramatically (and continue to) and the government starts to build up its institutional capacity to cover various aspects of development. Its adroit, even visionary leaders and their prudent economic policies foster macroeconomic stability, evade the resource

curse and maintain political stability. Probe a little deeper, however, and several acute social challenges are exposed, not least the multi-faceted consequences of the HIV/AIDS crisis, growing inequality and widespread unemployment among the youth.

The government recognises that economic diversification is the best antidote to some of the gravest challenges Botswana faces. This will require structural change. Ellen Hillbom argues that long-term sustainable growth and development in Botswana requires technological innovations, increases in productivity and a change in economic and political structures to ensure a rise in the living standards of the poor and equal distribution of resources, incomes and opportunities.²⁴

Economic Diversification

Economic diversification involves boosting non-traditional sectors, expanding the range of products and exports, engaging in and with new markets and development partners to compete on a global scale.²⁵ Economic diversification provides a means to propel and sustain economic growth in the long run, create an environment conducive to productive investment and one that can reduce macroeconomic volatility and protect an economy from external shocks which are characteristic of economies that rely on a single commodity or sector.²⁶

On the face of it, Botswana presents an almost ideal development story

It materialises in two forms: product diversification and export diversification. Product diversification refers to diversification in the goods produced and services provided by an economy. It involves a shift from producing simple goods to more complex and sophisticated ones. Hausmann et al. call this process 'economic complexity', which reflects the composition of a country's productive capacity and output and the structures and variables that generate a diverse mix of knowledge-intensive products.²⁷ According to them, economic complexity

drives growth and diversification as more complex products from various sectors become available and find new market opportunities. On the other hand, export diversification involves changing the share of commodities of one's export basket and expanding into new markets, both internally and externally. The nature of these forms of diversification means they have specific essential prerequisites: product diversification requires infrastructure development, institutional capacity and specialised know-how²⁸ whilst export diversification requires adequate investment and trade freedoms to ease exportation so goods have a chance to be globally competitive.

When pursuing product or export diversification, John Page suggests stakeholders consider 'what an economy makes' and 'where products are made'. There should be a focus on developing a variety of sectors with extensive consideration of the type of sectors being developed; are the sectors realistic and feasible in that particular context? Furthermore, it matters too where products are made; close proximity of suppliers and producers gives rise to information spillovers, learning from others and sharing infrastructural costs. Close proximity of firms also stimulates competitiveness which encourages innovation and increases productivity.²⁹

Of all stakeholders, government's role in shepherding diversification remains the most important.

A country's policy framework is at the epicentre of economic diversification. Getting policies right is the first step. One-size-fits-all industrial policies are fruitless, however; Dani Rodrik advises that, in general, all policies should aim to be highly specific, to take advantage of institutional endowment and respond to a country's constraints.³⁰ A balance needs to be struck between horizontal policies that emphasize macroeconomic stability, trade openness and a sector-neutral role for the state and vertical policies that favour particular sectors and firms in ways that bring down costs of production and encourage new entries.³¹

Government needs to be sufficiently insulated from private interests to reduce corrupt behaviour and avoid being 'in the pockets' of business

Thus, a government is responsible for designing, implementing, monitoring and evaluating policies favourable to local context; and managing institutions that can efficiently coordinate policies administered from various departments. This extends to include preselecting industrial projects or products on the basis of their economic attractiveness and feasibility, identifying and tackling sector-specific issues and not being afraid to pick winners and discard losers, that is use carrots *and* sticks.³² Having a regulatory framework that cultivates a healthy 'doing business' climate and identifies potential markets, sectors and products for new ventures provides a viable means for this to be achieved. In addition, a government needs to boost entrepreneurship through financial assistance and investing in social (education, skills) and physical (roads, power) infrastructure.

Leadership is another decisive aspect. Government needs to be sufficiently insulated from private interests to reduce corrupt behaviour and avoid being 'in the pockets' of business. However, at the same time it also needs to deeply engage with business to improve coordination and collaboration between the public and private sectors and to acquire information to understand where action is needed and in what

form.³³ To assist in this regard, there are no substitutes for accountable and competent government officials.³⁴

Government cannot do this alone. Business needs to pull its weight and invest in research and development, be innovative and explore new and existing sectors and products for enterprise opportunities. Small, micro and medium enterprises (SMMEs) can be key drivers of economies, providing a wide range of products in different sectors and contributing to uplifting individuals and communities in dire financial and social circumstances. The private sector needs to support and work with government by establishing communication channels, coordination mechanisms and actively participate in designing, endorsing and evaluating policies. These public-private partnerships are valuable linkages that are to be nurtured and conducted in good faith to positively influence the outcomes of the diversification process.³⁵

Success in diversifying any economy is contingent on a range of factors, some of which are ever-changing and often unpredictable

Success in diversifying any economy is contingent on a range of economic, political and social factors, some of which are ever-changing and often unpredictable. Macroeconomic stability, institutional capacity and good governance alone are not enough. Investing in certain sectors and production processes, infrastructure and skills development are all necessary for this multi-layered and multi-staged process. The government, together with business, needs to adopt a productive-orientated mentality³⁶ and work together to drive economic growth and diversification.

Mauritius is a stellar example of a country that has successfully moved from dependence on a monocrop to a diversified economy. Its economic success boils down to good macroeconomic management, leadership and governance, strong public and private institutions and cooperation between its

traditional sectors.³⁷ Two particular decisions stand out. Firstly, the government implemented policies that created a conducive environment for the private sector to grow and lead the economy; and secondly, it reformed its key sectors – agriculture, manufacturing and tourism – to promote exports and investments. When a crisis hit the sugar industry, the government used its accumulated revenues

from the sugar industry to develop the services sector whilst maintaining an interplay of import substitution industrialisation and export-orientated initiatives. Today, Mauritius' economy is diversified with agriculture, manufacturing, financial services, retail, hotels and restaurants and transport, storage and communications all contributing a similar chunk of the nation's GDP.

Diamonds are not Forever: Efforts to Diversify

Testament to the government's aim to diversify Botswana's economy are a host of state-led inquiries and interwoven diversification strategies housed in various government ministries and parastatals. Of these, the most important is the Business and Economic Advisory Council (BEAC)³⁸, a council set up in 2005 by then President Mogae to address the diversification challenge and government's most recent master plan, the Economic Diversification Drive (EDD)³⁹ drawn up in 2010 to be implemented from 2011 to 2016.

BEAC

The BEAC was mandated to identify constraints to diversification, to formulate a strategy and Action Plan and to identify key projects to take Botswana forward. Challenges identified included:

- dependence on revenues generated through diamond mining;
- a narrow economic base;
- declining FDI;
- high unemployment;
- mismatch between skills development and actual requirements; and
- an inward-looking mindset that was not conducive to private sector development.

In moving forth, the BEAC identified areas to be prioritised and projects to help accelerate the diversification process.

According to the BEAC, the government of Botswana, as the driver of diversification, would firstly have to create an enabling environment that not only

stimulates economic openness and the promotion of local and foreign investments but also encourages a mindset change among Botswana ensuring its citizen empowerment initiatives yield self-reliant entrepreneurs and producers of goods and services instead of dependent, unproductive citizens.

An important element of creating an enabling environment is ensuring that there is coordination between and within government ministries, parastatals, business and all involved to avoid mismanagement and miscommunication, duplication of policies or initiatives and discrepancies between intended planning and implementation. Secondly, dynamic structural and regulatory adjustments are crucial. Government would need to prepare to amend or abandon dysfunctional policies and institutions especially in areas concerning privatisation of parastatals, work and resident permits, company registration and business license processes and resolving land issues.

The BEAC's recommendations cover existing and new projects to drive diversification. Within the agriculture sector, the council calls for deregulation, commercialising and rebuilding the livestock sector by improving Botswana Meat Commission's (BMC) operational and marketing efficiency and investing in high value crops and agro-industry projects to increase agricultural activity and the sector's contribution to the economy. The tourism sector's potential could be fully utilised through promotion of other tourist destinations, not just the Okavango Delta and Chobe area. These destinations, because of their pricing, are not accessible to the majority of Botswana and if tourism is going to play a part

in the diversification process, more markets within the sector need to be exploited through establishing medium cost, high volume destinations.

Venturing into non-traditional sectors, the BEAC suggests the creation of free zones to attract FDI and new business activities in information technology and communications, biotechnology and specialised medical fields through tax, land and labour incentives. Different hubs will complement the free zones.

- The transport hub to convert Botswana into a logistics support hub for the region through investment in air, rail and road transport services for both passengers and cargo.
- The innovation hub – a centre to develop a high technology sector to provide incentives for businesses in IT, communications and biotechnologies to set-up shop in Botswana.
- The diamond hub to be started with the relocation of De Beers' Global Sightholder Sales from London to Gaborone to carry out all the diamond trader's operations – sorting, cutting, polishing and selling – a process that was assumed to increase revenues for the government and create employment opportunities for Botswana.

These hubs, according to the BEAC, would embody pockets of diversified sectors attracting local and international investors, breaking down 'doing business' constraints to enable business linkages and employment opportunities.

Areas of excellence to serve Botswana and the Southern African region are another key recommendation from the BEAC. A management training school, institutions with practical training, public health management specialising in HIV/AIDS and regional centres for training in hospitality and sustainable development are all noted as potential areas for excellence since Botswana are already involved in these initiatives. Other projects focus on improving banking and financial services to cope with expanding business activities along with marketing the country as an ideal place to do business, to travel in and to live in. Brand Botswana takes on the responsibility of marketing Botswana within and beyond its borders.⁴⁰

The BEAC's work was completed in 2006. Since then the different hubs have been built and efforts to improve the productivity of traditional sectors are under way.

EDD

In 2010, the government introduced another key strategy to advance its efforts to diversify the economy – the Economic Diversification Drive (EDD). This would be the five-year 'Master Plan'.

The EDD envisaged economic diversification characterised by product and market diversification within the minerals, agriculture, services and manufacturing sectors. In the short-term, government will assist private sector economic activities and programmes through support and protection but in the long-term, it is proposed that economic activities will be market determined and driven predominantly by the private sector with very little government intervention. The strategy's cornerstone is the introduction of priority thematic areas:

1. Sectoral Development and Business Linkages.
2. Export Development and Promotion.
3. Investment and Finance.
4. Quality Control, Standards and Production.
5. Technological Development, Innovation and Transfer.
6. Research and Development.
7. Entrepreneurship Development.

Of the seven thematic areas Sectoral Development and Business Linkages and Export Development and Promotion Function is the core of the EDD strategy with the rest taking on supportive roles.

According to the strategy, the objectives of the EDD include:

- developing globally competitive sectors;
- diversifying exports and export markets;
- making Botswana an investor and investment destination;
- developing goods and services that comply with local and international standards;
- creating a vibrant technology economy;
- promoting research and development; and

- developing an entrepreneurial culture for business growth and enhanced citizen participation.

Expected deliverables would be more pillars of growth, diversified sources of fiscal revenues and export earnings, industrialisation, entrepreneurship development and employment creation.

The EDD provides a comprehensive account of Botswana's diversification strategy – the expected

deliverables, the roles and responsibilities of all stakeholders, communication and consultative channels and implementation, monitoring and evaluation strategies. Progress in achieving the EDD aims has been negligible, however. The most compelling explanations for why diversification has not become a reality can be grouped around four main themes: Political Will; the Business Environment; Skills Shortages; and Mindset.

Political Will

The state is the engine of Botswana's economy. It generates the most revenues and investments into the country, it is the main shareholder of diamond revenues and the biggest employer. This dominance has stifled the role of the private sector and entrepreneurship, and has created a country where the state is wealthy but the people are poor. Though the state has been active in providing social services, grants and empowerment opportunities, its efforts have only cultivated a dependent and largely 'entitled' citizenry which constantly looks to the state for support. It is repeatedly being accused of implementing projects that are 'politically right for winning elections but not necessarily economically viable'. The national television station, BTV, regularly reports on President Ian Khama and his ministers handing over

houses to the poor in remote and rural areas as part of their 'Poverty Eradication Initiative'. Whilst these efforts may be necessary for immediate relief, there is little focus on sustainable policies and actions to alleviate acute poverty. Botswana has also become seemingly less immune to the continent-wide scourge of corruption in parastatals and government departments, where patronage is more important than performance.

The failure to diversify is, ultimately, a consequence of internal conditions that stymie efforts in the political, economic and social spheres. The government needs to demonstrate that it has the political will to bridge their rhetoric about diversification with actions and implementation.⁴¹

EDD Strategy

Some shortcomings are evident in the EDD Master Plan. The strategy's short-term plan is too reliant on import substitution and while there is historical success of import substitution policies, in a globalised world it remains unsustainable. The long-term plan of the EDD tries to address this problem but its success is contingent on Botswana producing quality goods and services that are competitive in the global market. While the strategy has some realistic objectives there are too many government departments offering very similar citizen empowerment initiatives and not

enough monitoring and evaluation. The EDD Unit has not been able to produce the strategy's mid-term review, which was due in 2013, apparently because of 'circumstances beyond our control'. The strategy is separated into short-term and long-term plans but the timelines for transition between the two remains unclear and undefined, nor are there clear guidelines to track progress. What's more, Botswana has various strategies and initiatives – such as Vision 2016 – running concurrently.

Doing Business

Botswana ranks 74th in the World Bank's Doing Business 2015 Report, marking the third year in a row it has dropped in the rankings significantly.⁴² Doing business in Botswana remains difficult. An official from the Botswana Confederation of Commerce, Industry and Manpower (BOCCIM), now Business Botswana, an advocacy organisation working to lobby for the economic interests of the private sector, highlighted some of the stiffest challenges: bureaucracy and red tape when registering a business; acquiring trading licenses and environmental impact assessment reports; and securing work and resident permits for employees. The Doing Business 2015 Report ranks Botswana 149 out of 189 economies in the Starting a Business category (it takes 60 days with ten procedures to be completed). These statistics are worse than the sub-Saharan regional average of 27 days and eight procedures to be completed.

There is great potential for local financial, security, logistics, manufacturing and construction businesses to emerge and act as support systems for the mines

A look into the state-dominated diamond mining industry and several concerns stand out. According to a Debswana employee with experience in the mines and offices, the 'industry does not support itself, we rely on inputs from outside our borders to run the mines'. Yet the mining industry and government could act as catalysts for economic growth. There is great potential for local financial, security, logistics, manufacturing and construction businesses to emerge and act as support systems for the mines, propelling the business linkages that the EDD strategy strives to establish.

Ross Harvey in his research report, 'Fossil Fuels: Botswana's Options for Economic Diversification' emphasises the potential of the mining industry, particularly the integration of coal, iron ore and copper-nickel to build a regional energy hub and

steel industry in Botswana. Harvey cautions against the negative environmental effects of mining and calls for mining activities to be done without compromising the ecological integrity of Botswana's tourist attractions and valuable wilderness spaces.⁴³ Despite several internal challenges such as infrastructural development, water and power constraints, Harvey is adamant that mining, especially the local production of iron ore, can bring enterprise opportunities for local retail and other services and build inter-industry linkages that develop complementary aspects for Botswana's mineral endowments.⁴⁴

An ex-De Beers executive believes 'we are asking ourselves the wrong questions ... we should be asking ourselves why diamond cutters and polishers in India are doing better than us?'. The city of Surat in India is the heart of the diamond cutting and polishing industry with nearly a million workers. Botswana in comparison has only 3 000 cutters. How did a country that does not have a single diamond mine manage to become the leader in cutting and polishing of diamonds?⁴⁵

The landmark move of De Beers' operations and its Sightholders from London to Gaborone provides real opportunities for beneficiation and local empowerment. But using the leverage of immediate access to diamonds does not make a strategy; only by becoming more skilled and more competitive can this move be turned into a sustainable advantage. Harvey seconds this argument, arguing that the De Beers' move contributes to diversification and value addition but it's a model dependent on an exhaustible resource and one that confirms Botswana's over-reliance on primary commodity exports.⁴⁶ What will happen when demand for rough diamonds decreases or when diamonds run out? This ex-executive argues that we need to go beyond a legal agreement with De Beers and learn from precarious cases like Lesotho and the African Growth and Opportunity Act (AGOA), established by the US to enhance market access for goods from sub-Saharan Africa into the US. In Lesotho, Asian textile and clothing investors have flooded the market to take advantage of favourable conditions on offer through AGOA but these investors will most likely relocate their shops once AGOA expires. These are not sustainable solutions to

economic growth or diversification and our strategies need to look beyond having readily available diamonds as their only selling point, as Harvey puts it.

A general concern with the government is the lack of foresight and implementation capacity. Forty years of diamond mining and Botswana does not have a single diamond cutting and polishing school. The Debswana employee reaffirms this by saying 'Batswana ba itse gore re na le ditaimane fela, ga ba itse sepe ka industri ya ditaimane' (Botswana only know that we have diamonds, they know nothing about the diamond industry). Lack of foresight permeates into other projects the government have invested in. Sir Seretse Khama International Airport, envisioned to be completed in 2010 to capitalise on the FIFA World Cup in South Africa, has only recently been completed – five years after the initial completion due date. The multi-million Fengyue Glass Manufacturing Project, a joint venture between Chinese Shanghai Fengyue Glass Company and the parastatal Botswana Development Corporation, was expected to create jobs and boost the manufacturing industry, but it was liquidated before operations began due to 'poor due diligence, doubtful partner selection and project implementation violations'⁴⁷.

A crucial aspect of doing business is access to a reliable supply of utilities

A crucial aspect of doing business is access to a reliable supply of utilities. Currently, the country is faced with an expensive and unreliable supply of water and electricity. The North–South Water Carrier I pipeline has experienced several pipe bursts leaving the southern region with water shortages. The government invested in this project as far back as the 1960s and it is not clear why the pipeline keeps malfunctioning.⁴⁸ The carrier is the water lifeline of the southern region, carrying water from the Letsibogo Dam in the north to the south. Currently, after numerous pipe bursts, the government is working on constructing a second pipeline to run parallel to the one in existence. In the meantime, households, schools and businesses, especially manufacturers and farmers, are negatively affected. With vast amounts of coal at the Morupule Colliery, the government of

Botswana invested in the Morupule B Generation and Transmission Project which brought life to Morupule B Power Station as a means of ensuring a reliable and affordable supply of electricity and to curb dependence on external sources of energy. To date Morupule B Power Station fails to operate at full capacity, with speculation that it is on the verge of collapse – it has cost the government 11 billion Pula, with reports that an additional 8 billion Pula will be required for maintenance and the second phase of construction.⁴⁹

The themes are recurrent across different projects and industries: government is overspending and there is very little to show for it. Too little attention is paid to the opportunity cost of (failed) projects and why excessive amounts of money are being spent with no beneficial outcomes. Foresight and adequate implementation capacity together with due diligence need to be the cornerstones in project planning and management. Without these the government's projects will remain expensive, non-deliverable ventures.

The private sector is not without fault. With comments like 'private sector ya rona ke mathata, re batla di handouts fela' (our private sector is a problem, we only want hand-outs), government officials are critical of the private sector's performance. An official from the Ministry of Trade and Industry (MTI) describes the private sector as too dependent on government. The official explains:

People just want to get tenders, get incentives from government and make fast cash. We have noticed that once they get the tender from government, the job becomes sloppy. During site visits to businesses that are certified under the EDD programme to make sure they are keeping up with set regulations and standards we often find businessmen and women operating as middlemen who do not produce the goods they are supplying but instead importing them from South Africa or China. Too many middlemen results in less production which slows down the economy and its prospects to grow and diversify. Public-private partnerships need to be improved and made more efficient and the private sector needs to come to the party.

The MTI official agreed that some government policies were stringent and yielded no results besides stalling progress within the private sector. It is these and other issues that the public and private sectors need to come together to discuss and solve. Accessibility to channels and platforms for communication is vital. The potential success of public–private partnerships is discernible in the diamond, agriculture, transport, innovation and education hubs that were established from recommendations by the BEAC. These hubs are fairly recent developments and time will tell how they have contributed to growing and expanding the economy. Nonetheless, they are public–private efforts that need to be harboured because of their potential rewards.

Agriculture and tourism are traditional industries that could serve as platforms for diversification if space is given to new ideas and approaches. An expert on Botswana's agriculture sector puts it this way:

We need to stop relying on imports of raw materials and machinery like feed processors and millers ... then we need to satisfy the domestic

market, let me give you an example, right now our dairy sector is only satisfying 20 percent of national demand, once we satisfy the rest then we can think about expanding into markets outside our borders, even though we are landlocked, we can tap into the SADC region market as we are in a good geographical position for distribution and this can be realized once we complete the Kazungula Bridge Project.

The Kazungula Bridge Project is a collaboration between the governments of Botswana and Zambia to facilitate easier and cheaper movement of goods within the region. Business can capitalise on Botswana's location in the region and encourage the government to partake and invest in regional infrastructure developments. The Kazungula Bridge will serve as a gateway for goods to enter markets in the SADC region but also for tourists to enter and explore Botswana. The government is creating opportunities for private sector growth but the sector needs to become more sustainable, competitive and innovative if it is to stand on its own.

Skills, Productivity and Entrepreneurship

The paucity of adequate skills and low levels of productivity and entrepreneurship are serious impediments to diversification. A representative from the Human Resource Development Advisory Council (HRDAC), which works to identify how human resources in all sectors can be improved, notes that one of the biggest challenges Botswana faces is a mismatch between the skills available and those that are needed to advance the economy. 'The standard of our academic and training institutions is below par and the government together with the HRDAC and Botswana Qualifications Authority have embarked on a project to re-register and accredit these institutions in accordance with international standards' says the representative. This will help ensure that the quality of education offered produces capable and competitive individuals. With effective work from the HRDAC, it is anticipated that the necessary learning and training

institutions will be established to deal with the mismatch of skills supply and demand. The Ministry of Education and Skills Development needs to improve its performance because poor educational results are partly due to the ministry's disorganisation, financial mismanagement and inadequate research for planning purposes.

According to the 2015–2016 Global Competitiveness Report poor work ethic is the most problematic factor for doing business in Botswana, with the main areas of concern being attitude and reliability of the workforce.⁵⁰ Though difficult to measure, low productivity and lack of entrepreneurship (and consequently competitiveness) among Botswana are reported to be other factors crippling economic diversification. Low productivity is associated with lack of experience and motivation mostly due to low compensation and inadequate skills for the job. In terms of entrepreneurship, representatives

from both public and private sectors accused Botswana of having 'no entrepreneurial spirit or drive' adding that Botswana are only concerned with

making fast money instead of focusing on the sustainability and expansion of their businesses.

Conclusions

Ineffective policies and strategies, lack of due diligence and corruption, a restrictive business environment and inadequate skills development have held Botswana back and embedded the diversification curse.

The Botswana Economic Advisory Council's role in 2005 was diagnostic and prescriptive. It was mandated to identify constraints to diversification and to draw up an Action Plan to propel economic diversification and sustainable development. Whilst the recommendations proposed by the Council were feasible, the onus fell on government to sell the proposal to businesses and Botswana, resulting in government being the primary driver of the process. On the issue around ownership of the Action Plan, it is useful to consider Botswana's coat of arms and the three cogwheels representing the branches of industry. If one cogwheel, say business, does not work (or own the process) the wheels will not turn; the economy needs to be a well-oiled machine if economic diversification and sustainable development are to be realised.

The most recent Master Plan, initiated and drawn up by government, the EDD strategy housed in the Ministry of Trade and Industry, has brought on board business, labour and civil society as strategic partners in the diversification process. The EDD strategy is the guiding blueprint for short- and long-term efforts to diversify the country's economic landscape. In theory, the strategy focuses on pertinent issues with a set of recommendations and an implementation model with clear objectives, measures, strategic initiatives, targets and identification of those responsible for delivering outcomes and leading the process. In practice, it is difficult to measure progress as it is unclear which targets have and have not been met and why. This is mainly due to the Ministry of Trade and Industry and its EDD Unit's failure to produce a mid-term review of the strategy. Botswana's dependence on the mining industry has not diminished and the growth of

other sectors has not taken off. Effective implementation, monitoring and evaluation will be critical going forward.

When examining Botswana's institutional capacity, it is evident that the right institutions have been put in place – but they have not been effective owing to a lack of coordination on decision-making, prioritisation and implementation. Historically, citizen empowerment initiatives in Botswana have focused overwhelmingly on distribution, while production has been given short shrift. The consequence has been no return on investment. Wherever government money is being spent – via the National Development Bank, CEDA or LEA – it is imperative that it gets channelled into productive initiatives that contribute towards diversification.

No one should doubt the achievements Botswana has made in infrastructure development since independence – roads, schools, hospitals and energy provision are better than most of the continent. At the same time, Botswana has also made too many costly investments into what have become the white elephants of Botswana; Sir Seretse Khama International Airport, Morupule Power Plant and the North–South Water Carrier are notable members of the herd. Similar to Botswana's institutional capacity, the challenge does not lie in planning, it lies in execution – due diligence and corruption being core hindrances to effective execution.

Specialised know-how is crucial for product diversification and in Botswana the education system has not adequately prepared graduates to enter the work market into sectors that contribute towards diversifying the economy. Producing graduates with the right skills and qualifications is a central challenge. In the meantime, due consideration must be given to filling the gap – and facilitating skills transfers – through incentives to attract foreign skilled labour, which is how countries like Dubai kick-started and drove their diversification efforts.

The business environment is a determining factor for successful export diversification. Too many onerous requirements and procedures make doing business in Botswana difficult. These need to be revised to attract both local and foreign investors. The traditional sectors – agriculture, mining and tourism – provide vast opportunities for new product developments and exports. The private sector continues to operate under the wing of government with government serving as the main customer. This relationship has to change; government tenders cannot be the only means to growth. Botswana's market is limited as a consequence of a small population. The ethos 'export or die', which seemed to animate much of the East Asian success of the 1960s, transforming a period of crisis into a period of boom, is particularly apposite. The economy

needs to produce quality goods that are competitive in the SADC region.

Economic diversification is a task that needs government, business and wide public commitment. Botswana need to come to the party and own the diversification process. In the decades following independence Botswana managed to grow the economy and use diamond revenues to develop the country. In the 1980s, President Sir Seretse Khama urged Botswana to contribute a bull each or goods and services amounting to a bull towards the building of the University of Botswana; it was called the 'One man, one beast movement'. Today the challenge is different and more complex than building a university. But if that same spirit of collective purpose can be summoned towards the aim of diversification, the 'curse' may eventually be overcome.

Endnotes

- 1 See Daron Acemoglu, Simon Johnson and James Robinson, 'An African Success Story: Botswana' 2001, pp. 1–53.
- 2 World Bank Development Indicators, Available: data.worldbank.org/country/Botswana, Accessed 5 May 2015.
- 3 Industry includes mining, manufacturing, construction, electricity, water and gas. World Bank Development Indicators, Accessed 5 May 2015.
- 4 Bank of Botswana Annual Report 2002, p. 71.
- 5 See www.debswana.com and <http://www.mining-technology.com/features/feature-the-worlds-top-10-biggest-diamond-mines/>, Accessed 9 May 2015.
- 6 Bank of Botswana Annual Report 2013, pp. 67; 78.
- 7 Statistics Botswana, 'Botswana International Merchandise Trade Statistics', *Monthly Digest*, No. 2014/08, September 2014, p. 3.
- 8 Statistics Botswana, 'Gross Domestic Product', No. 2015/1, April 2015, p. 5.
- 9 Ministry of Finance and Development Planning, 'Quarterly Economic Bulletin', December 2014, p. 3; Bank of Botswana Annual Report 2013, p. 73.
- 10 2015 Budget Speech, <http://www.dailynews.gov.bw/news-details.php?nid=17364>, Accessed 11 May 2015.
- 11 Debswana Annual Report 2013, p. 48.
- 12 Balefi Tsie, 'The Political Context of Botswana's Development Performance', *Journal of Southern African Studies*, Vol. 22, No. 4 (1996), p. 600 and Philippe Martin, 'A Closer Look At Botswana's Development: The Role of Institutions', Vol. 9. (2008), p. 42.
- 13 Philippe Martin (2008), p. 43. Maria Sarraf and Moortaza Jiwanji, 'Beating the Resource Curse: The Case of Botswana', *The World Bank Environmental Economics Series* (October 2001), p. 9.
- 14 See Philippe Martin, (2008), pp. 35–54. Robinson, Ragnar Torvik, Thierry Verdier and James Robinson, 'Political Foundations of the Resource Curse', *Journal of Development Economics*, Vol. 79 (January 2006), pp. 447–468; Halvor Mehlum, Karl Moene and Ragnar Torvik, 'Institutions and the Resource Curse', *The Economic Journal*, Vol. 116, No. 508 (January 2006), pp. 1–20; Maria Sarraf and Moortaza Jiwanji (2001), pp. 1–21; Michael Lewin, 'Botswana's Success: Good Governance, Good Policies, and Good Luck', 2011.
- 15 Ministry of Agriculture, National Agriculture Policy 1991.
- 16 Francis Owusu and Abdi Ismail Samatar, 'Industrial Strategy and the African State: The Botswana Experience', *Canadian Journal of African Studies*, Vol. 31, No. 2, 1997, p. 275.

- 17 2015 Budget Speech, <http://www.dailynews.gov.bw/news-details.php?nid=17364>, Accessed 11 May 2015.
- 18 Ibid.
- 19 UNAIDS, <http://www.unaids.org/en/regions/countries/countries/botswana>, Accessed 11 May 2015.
- 20 Philippe Martin (2008), p. 44.
- 21 Ibrahim Index for African Governance, <http://www.moibrahimfoundation.org/>, Accessed 7 May 2015.
- 22 Directly translated into English as 'callings'. The government introduced *pitsos* in 2010 to increase citizen participation in decision-making processes through 'opinion-gathering meetings'.
- 23 Botswana ranks second in Africa, behind Mauritius, in the Global Democracy Rankings. http://democracyranking.org/?page_id=14, Accessed 7 May 2015.
- 24 Ellen Hillbom, 'Botswana: A Development-Oriented Gate-Keeping State', *African Affairs*, Vol. 111/442, (2011), p. 192.
- 25 Akram Esanov, 'Economic Diversification: Dynamics, Determinants and Policy Implications', *Revenue Watch Institute*, p. 5; Alan Gelb, 'Economic Diversification in Resource Rich Countries', p. 1; UN Office of the Special Adviser on Africa and NEPAD–OECD Africa Investment Initiative, 'Economic Diversification in Africa: A Review of Selected Countries' (2010), p. 9
- 26 Akram Esanov, 'Economic Diversification: Dynamics, Determinants and Policy Implications' p. 4; Akram Esanov, 'Diversification in Resource-Dependent Countries: Its Dynamics and Policy Issues', *Revenue Watch Institute*, p. 5; Alan Gelb, 'Economic Diversification in Resource Rich Countries', John Page, 'Rowing Against the Current: The Diversification Challenge in Africa's Resource-Rich Economies', *Brookings Global Economy & Development*, Working Paper 29 (December 2008), p. 1
- 27 Hausmann, Hidalgo et al, *The Atlas of Economic Complexity: Mapping Paths to Prosperity*, Harvard University: Centre for International Development, p. 18.
- 28 In their study, Maier and Wood find that countries that fail to invest in human capital will find it difficult to move away from dependence on simple, primary products towards more sophisticated products. See Alan Gelb, 'Economic Diversification in Resource Rich Countries', p. 10.
- 29 Ricardo Hausmann et al, *The Atlas of Economic Complexity: Mapping Paths to Prosperity*, pp. 5–7.
- 30 Dani Rodrik, 'Policies for Economic Diversification', *Cepal Review* 87, (December 2005), p. 9.
- 31 Alan Gelb, 'Economic Diversification in Resource Rich Countries', p. 3.
- 32 Helmut Asche, Philip Neureburg and Matteo Menegatti, 'Economic Diversification Strategies: A Key Driver in Africa's New Industrial Revolution', *UN Development Policy, Statistics and Research Branch*, Working Paper 2/2012, pp. 15–16; Dani Rodrik (2005), pp. 20–21.
- 33 Dani Rodrik (2005), p. 9.
- 34 UN Office of the Special Adviser on Africa and NEPAD–OECD Africa Investment Initiative (2010), pp. 10; 54.
- 35 Ibid, p. 11.
- 36 Dani Rodrik (2005), p. 23.
- 37 http://www.academia.edu/4457267/The_State_and_Economic_Development_The_Success_Story_of_Mauritius_, p. 1.
- 38 The BEAC was established by the government of Botswana with the involvement of the Brenthurst Foundation. Originally referred to as a 'Committee', it subsequently developed into the 'Council'. Business and Economic Advisory Council, 'A Strategy for Economic Diversification and Sustainable Growth', (September 2006), pp. 1–71.
- 39 Ministry of Trade and Industry, 'Economic Diversification Drive: Medium to Long-Term Strategy 2011–2016', *Botswana Government* (July 2011), pp. 1–91.
- 40 See Ngozika Amalu, 'A Brand Apart: Nation Branding in a More Competitive Africa', Brenthurst Foundation Publications, Discussion Paper 3/2013, p. 21; also see Botswana Investment and Trade Centre, <http://www.bitc.co.bw/brand-botswana>, www.bitc.co.bw/brand-botswana.
- 41 See 'Projects to diversify economy' in the *Daily News*, 'Govt moves to eliminate trade barriers'. Available in Mmegi Online, www.mmegi.bw/index.php?aid=54528&die=2015/october/02, Accessed 14 October 2015, 'Botswana to use some of its reserves for Economic Stimulus Plan', Available in Bloomberg News www.bloomberg.com/news/articles/2015-10-12/botswana-to-use-some-of-its

- reserves-for-economic-stimulus-plan, Accessed 14 October 2015, 'Govt pledges unlimited support for young innovators', Available in Mmegi Online, www.mmegi.bw/index.php?aid=54687&dir=2015/october/08, Accessed 14 October 2015.
- 42 See World Bank Doing Business 2015 Report, <http://www.doingbusiness.org/data/exploreeconomies/botswana/>, Accessed 1 June 2015.
- 43 Ross Harvey, 'Fossil Fuels are Dead, Long Live Fossil Fuels: Botswana's Options for Economic Diversification' *Governance of Africa's Resources Programme*, SAIIA Research Report 20, August 2015, p. 7
- 44 Ross Harvey (2015), p. 56.
- 45 See <http://www.miningweekly.com/article/diamond-cutting-and-polishing-industry-in-distress-2013-06-07>, Accessed 22 June 2015.
- 46 Ross Harvey (2015), p. 24.
- 47 See <http://www.dailynews.gov.bw/news-details.php?nid=4429>.
- 48 See <http://www.gov.bw/en/Ministries--Authorities/Ministries/Ministry-of-Minerals-Energy-and-Water-Resources-MMWER/Tools--Services/News-and-Press-Releases/The-North-South-Carrier-Scheme-I-experienced-a-pipe-burst--/>.
- 49 See <http://www.weekendpost.co.bw/wp-news-details.php?nid=513>, Accessed 23 June 2015.
- 50 See 'Botswana's poor work ethic repute worsens' in Mmegi Online www.mmegi.bw/index.php?aid=54596&dir=2015/october/06, Accessed 14 October 2015.