SATRN

Air and Road Transport in Botswana

Gape Kaboyakgosi[1]
Botswana Institute for Development Policy Analysis
April 2003

SATRN Working Paper No. 5

Botswana Institute for Development
Policy Analysis (BIDPA)
Private Bag BR-29
Gaborone
Email: gapek@bidpa.bw

1 The author wishes to acknowledge the assistance provided by all key informants in providing the information and insights in the writing of the report. The paper has benefited from comments from Kenedy Mbekeani of BIDPA and SATRN. The views contained in the report do not necessarily represent the views of SATRN or BIDPA. Funding for this project was provided by SATRN.

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Abstract

In this report we make an assessment of the transport sector in Botswana by analyzing policy and performance in the air and road transport sectors. The study had several other objectives among which was to identify reform needs for the two sectors, facilitate ease of comparison among SADC countries and assist policy makers identify possible areas for liberalization and harmonization of regional transport policies and strategies.

Among the several conclusions reached in the report is that the air transport sector is more tightly regulated than the road transport sector is. Air Botswana has finally become profitable. This makes the corporation well placed for good performance once it is privatized in 2003.Government responses to changes in transport technology and global trading regimes do occur, albeit at a slower pace as compared to the various challenges facing the industry. Some regulatory entities lag behind in terms of organizational capacity for their increased roles coming with increased liberalization. As pertains to the General Agreement on Trade in Services (GATS), it will make more sense for Botswana to make commitments in the air transport sector at a multilateral level. However, the country will stand to benefit more by concentrating on regional integration agreements when it comes to road transport since for reasons of physical proximity and economic interdependence it makes more sense to commit to regional integration agreements in road transport.

1 BACKGROUND

Botswana's transport sector is of great importance to the country's developmental objectives. The major modes of transportation are road, air and rail. Because Botswana is landlocked, marine transport, while important in terms of transporting goods to Europe, Asia and North American markets is not directly under the influence of the Government of Botswana to any significant degree in terms of policy interventions.

In 2000, Botswana had a total of close to 20,000 kilometers of highway, of which 8761 were bituminized. The total of unpaved and graveled road surfaces is about 11200 kilometers (MFDP, 2002). There are a total of 12 airports with paved runways and about 80 airstrips with unpaved runways. Of the 12, Air Botswana uses 5 on their normal operations. Three of the five regularly serve international transport needs (MFDP, 1997).

Being at the centre of the SADC region, Botswana roads act as transit hub for the movement of goods from South Africa to other SADC neighbors in the north and west and to a lesser extent from other SADC countries to South Africa. Rail lines cover a total distance of 971 kilometers. Rail transport suffered a major setback in 1999 when the Zimbabwean government diverted Botswana bound traffic at Beitbridge straight to South Africa thorough its Beitbridge connection, thus bypassing Botswana. However, rail transportation remains one of the major ways of carrying bulk cargo in Botswana.

Botswana is located in the middle of Southern African Development Community, a regional political and economic bloc consisting of fourteen countries. The total area of the country is 600,370 square kilometers. Botswana has no coastline, being completely landlocked. The country shares borders with Zimbabwe, South Africa and Namibia.

Botswana's over reliance on diamond revenue has lately been a great cause of concern to government, to the extent that the major objective of the just ended National Development Plan 8 was economic diversification[2]. Several strategies have been employed by the state to achieve that goal. One such strategy was attracting Foreign Direct Investment. The country stimulates growth in the services sector. Transport, telecommunications, finance, construction and tourism are some of the service sectors that government actively stimulates to forge ahead with economic growth.

Unemployment remains one of Botswana's major socio-economic challenges. It has been growing steadily in Botswana since the early 1980s. In 1980, the rate of unemployment stood at 10% of the labor force and was at 17% in 1984. In 1994 the rate declined somewhat to 14%. In 2000, the unemployment rate in Botswana stood at a high rate of 19% of the labor force (MFDP, 2001).

1.1 OBJECTIVES OF THE STUDY

At the Fourth World Trading Organisation Ministerial Conference in Doha in November 2001, Members agreed to submit initial requests for specific market access commitments by 30 June 2002 and initial offers by 31 March 2003 in priority

[2] Botswana's development is centrally managed and coordinated through eight year National Development Plans.

service sectors. These sectors include; telecommunications, financial services, and transport. As a result, there is a need for policy makers in Botswana and other SADC countries to understand these sectors if they are to meaningfully negotiate their countries' positions at the General Agreement on Trade in Services (GATS) forum.

To this end, this study analyses the transport sector in Botswana. This is done by assessing policy and performance in the air and road transport sectors. The major objectives of this study are:

- To conduct an assessment of policy and performance of the air and road transport sectors in Botswana;
- To identify reform needs for the two sectors;
- Facilitate ease comparison among SADC countries in the transport sector; and,
- Assist policy makers to identify possible areas for liberalisation and harmonisation of regional transport policies and strategies.

1.2 METHODOLOGY

Data for this study was collected using a standard questionnaire formulated by the World Bank. The questionnaire was administered to government policy makers as well parastatals responsible for transport and transport related activities, for both the air and road transport sectors.

The questionnaire comprised of; Market Access, Ownership; Market Structure, Regulation, Past and Future Changes in Policy, Regional integration Agreements in air and road transport Services, Employment, Investment, Pricing, and Innovation. Results from the questionnaire are attached as Annexes 1 and 2.

1.3 ORGANIZATION OF THE REPORT

The report is organised as follows:

- Section 2 focuses on the air transport sector by giving an analysis of policy and performance in the sector;
- Section 3 analyses policy and performance in the road transport sector;
- Section 4 restates the major findings of the report, comparing the major findings in both the air and road transport sectors and provides recommendations on possible means to improve policy and performance in the air and road transport sectors

2 AIR TRANSPORT

Botswana is signatory to the Chicago Convention of 1944[3]. The thrust of the convention is the need for the then fifty-two member countries to retain control over aircraft allowed to use their airspace or land on their territory, a practice that still persists. Most airspace agreements operate on a bilateral basis where contracting countries also regulate their airliners, the common practice of which is to have national flag carriers operating between the contracting parties.

While the history of air travel in Botswana dates back to as early as 1919, air transport operations started in earnest in 1984 with the opening of the country's first international airport (Sir Seretse Khama International Airport). The regulatory authority for air transport in Botswana is the Department of Civil Aviation. This department is under the supervision of the Ministry of Works and Transport. The Civil Aviation Act of 1977 is the regulating Act for civil aviation matters in Botswana.

Air Botswana is the country's national flag carrier. After several failed attempts to create such an entity, the airline was established through a statute, the Air Botswana Act of 1988. In the initial years of its existence, Air Botswana was mainly a loss making entity. However, after several years running at a loss, the corporation finally became a profitable parastatal and is set to be the first of Botswana's major parastatals to be privatized.

2.1 MARKET ACCESS

Access to Botswana's air transport sector requires among others that the country of origin of the aircraft has a bilateral agreement with Botswana, or that the entity applying for such access is duly registered in Botswana under the Companies Act. Another requirement as stated in the Civil Aviation Act of 1977 is that "only the government of Botswana, Botswana companies and companies incorporated in Botswana" are qualified to hold ownership of an aircraft in Botswana or a share therein.

Entry into the scheduled domestic air transport services is restricted to Air Botswana which are the only airline operating the domestic scheduled flights. Chartered flights operate the non-scheduled operations. These flights go to areas not serviced by Air Botswana. 80% of this service is mainly to the tourist hub in the northern part of the country.

For airlines coming from countries that are contracted with Botswana by bilateral agreements, there is an additional requirement that such aircraft be registered with the civil aviation authority in the contracting country. Other requirements are that the aircraft must have a certificate of airworthiness duly rendered valid under the laws of the country of origin of the aircraft. Temporary Air Service Permits are required in cases where aircraft from outside of Botswana have to fly temporarily into the country, if such are not approved under any bilateral agreements. The Director of Civil Aviation has the power to approve of such requests.

International air transport in Botswana is a duopoly currently operated by Air Botswana and South African Airways. Botswana's fully operational bilateral agreement is the one with South Africa while the one with Zimbabwe is partially

[3] The Convention on International Civil Aviation, accessed at the Institute of Air Space and Law: http://www.iasl.mcgill.ca/airlaw/public.htm

operational, with Air Botswana flying to Harare, whereas Air Zimbabwe does not fly to Botswana. Johannesburg-Gaborone, Johannesburg-Kasane, Johannesburg-Maun and Gaborone-Harare are the four routes making up Botswana's "international route", with the Johannesburg-Gaborone one being the busiest of them[4]. Both Air Botswana and South African Airways operate the Johannesburg-Gaborone route while Air Botswana operates the other two alone.

Cross border supply of air transport services are also regulated by bilateral agreements. Under such agreements, contracting countries designate a carrier (or carriers) that may operate between them. As per the Civil Aviation Act (1977), only companies operating in countries with existing agreements with Botswana may operate in Botswana. Such airlines may also either belong to citizens of Botswana, the Government of Botswana, or companies incorporated in Botswana under the Companies Act or having their principal place of business in Botswana.

Market access into luggage and freight loading and unloading is restricted to Air Botswana. However, the corporation may sub-contract such duties. Currently this occurs in Maun, where Air Namibia handles this service on behalf of Air Botswana at the Maun International Airport, Botswana's second largest and busiest airport.

Air Botswana Engineering is a subsidiary of Air Botswana that performs the engineering duties for the airline. Air Botswana Engineering has also, from time to time been engaged by other regional airlines such as Air Malawi to perform their repair and maintenance functions.

Entry into provision of fuel for air transport is through an open tendering system. Currently Air Botswana has an exclusive deal with BP Botswana (Pty) Ltd for that service.

2.2 OWNERSHIP

Air transport industry in Botswana is relatively small and, as is the case in the industry world-wide, tightly regulated. In Botswana's situation, there are two types of market players; the big, established, government backed airlines and the smaller, privately owned aircraft. Examples of the former entities in Botswana are Air Botswana, owned wholly by government of Botswana. The Minister of Works and Transport has the prerogative to appoint and approve members of the airline's board of directors. However, the day to day running of the airline's business is on strict business principles and it is government's policy to interfere as little as possible in the running of the airline. The other major airline is South African Airways, which is owned by both the South African government and Swissair, with the latter holding at least 20% of the airline.

The other group of market players is the small operators who run chartered aircraft, which are privately owned. Most of the business operations of the smaller operators involve flying people and cargo to places where Air Botswana does not operate to as well as to the tourist hub in the northern part of the country.

For both the scheduled domestic and international air transport, the Civil Aviation Act imposes no private equity limitations for new entrants into the market. However, the condition of the existence of a bilateral agreement between Botswana and the country of origin of the airline in question is still a primary requirement where the operator is foreign.

[4] While Air Botswana operates to Zimbabwe, currently no Zimbabwean airline operates the Gaborone-Harare route.

Air Botswana owns luggage and freight loading and unloading infrastructure and personnel at Botswana's major airports. However, in Maun, the airline has sub-contracted Air Namibia to operate freight loading and unloading as well as handle ground cargo.

All five of Botswana's major airports are publicly owned and publicly operated. Besides the five major airports, there are currently a total of 27 government airstrips, and 115 privately owned airstrips (MFDP, 1997).

2.3 MARKET STRUCTURE

Air Botswana has a 100% market share of the domestic, scheduled market. Other means of domestic air transport are the non-scheduled chartered flights that mostly operate to the northern part of the country where operators fly tourists from the north-western town of Maun, which hosts the second busiest airport in the country and Kasane. Small operators mostly run these.

The international air transport market in Botswana is currently a duopoly. Air Botswana and South African Airways both operate scheduled international transport. Air Botswana operates mostly through flying people from Gaborone to Johannesburg where they can make long distance connections to the rest of the world. The other routes that Air Botswana operates are the Gaborone-Harare, Johannesburg–Maun, and Johannesburg-Kasane routes.

South African Airways are currently the only other airline, besides Air Botswana running regular scheduled international flights to and from Botswana. Air Botswana has 60% of the Botswana international air market while South African Airways holds the rest.

The main international airport terminal has a capacity of 136 passengers and an apron capacity of 17 aircraft. Currently BP Botswana is the exclusive provider of fuel for Air Botswana at the main international airport. Air Botswana operates the luggage and freight loading and unloading services at the country's major airports. Air Botswana and South African Airways are the two airlines that operate the computer reservation system at the main national airport. Still at Botswana's main international airport, aircraft repair d maintenance is done by Air Botswana Engineering.

2.4 REGULATION

Air transport activities in Botswana are regulated by the Department of Civil Aviation, (DCA). The department regulates both carriers and airports. The DCA was established in 1978. The department has a total of 817 economic and technical professionals. The DCA is under the supervision of the Ministry of Works and Transport and is fully funded by Government of Botswana. It is organized in a hierarchical structure, headed by the director who is assisted by the deputy director. The director reports directly to the permanent secretary, Ministry of Works and Transport. Below the deputy director are several heads of divisions who have direct reporting lines to the director. These divisions include:

- **Air Transport Division** responsible for, among others, the overall planning and policy for the civil aviation sector including statistics, records and economics of air transport.
- **The Flight Safety Division** responsible for flight operations, airworthiness, personnel licensing and aviation accident prevention.

- **Telecommunications Division** responsible for electronics and telecommunications engineering and communications operations
- **Aerodromes Engineering Division** responsible for engineering works of civil aviation works, maintaining airport facilities and advising other institutions on obstacle limitations and land use around airports and airfields
- **Air Traffic Service Division** responsible mainly for Telecommunications Division and the Aviation Ground Services Division
- **Aviation Ground Services Division** responsible for the airport management, aviation security, leases at the airports, aircraft housekeeping and revenue collection among other duties

2.5 POLICY CHANGES IN THE AIR TRANSPORT SECTOR

A lot of transformations have occurred in the air transport sector in recent years. Most of these have to do with the rapidly changing technology in the sector and imperatives for change coming from the rapidly changing world trade regime due to the liberalization of global trading systems. Botswana's air transport sector has responded to these through appropriate policy changes, some of which include:

- Planned privatization of Air Botswana. The Government plans to divest part of its 100% ownership of the airline. Privatization is going to take the form of initial sale of equity to a strategic partner and ultimately sale of shares by means of initial public offering. Between 25 and 30% of the airline's stake is to be offered to a strategic partner. 5-10 % stake of the airline will be offered to employees while government will retain the remainder of the airline.
- Creation of the Civil Aviation Authority: Government plans to create the Civil Aviation Authority, (CAA). This entity which will come out of the restructuring of the current Department of Civil Aviation will be autonomous and its mandate will be to supervise the increased competition in the air transport sector which will come with the privatization of Air Botswana.
- Installation of approach and area radar: As a way to enhance smooth and efficient operation of air traffic, government plans to install area and approach radar at the Gaborone and Maun airports. The innovations will facilitate the interface of Maun Airport radar equipment with that of the Sir Seretse Khama International Airport, leading to enhanced flight safety.
- Expansion of terminal capacity at major airports: Government plans to expand the terminal capacity regime at the Gaborone, Maun and Kasane airports in the near future. This is to enable the airports to carry bigger aircraft. It will also enable such airports to have separate landing and take-off runways, since currently, at all of Botswana's major airports, landing and take-off cannot occur simultaneously because of the small runways.

2.6 SUBSIDIES

Government has not subsidized Air Botswana in the last five years. In the last five years, the government did not have to cover any of the airline's operational losses either. Air Botswana has been making profit for each of the past six consecutive years. While in the initial years of operation Air Botswana incurred financial loses for the years 1988 to 1993, in 1994 government chose to write off the airlines' accumulated losses of P 74 million, converting them into equity hence providing a more favorable debt equity ratio for Air Botswana (MFDP, 1997).

2.7 REGIONAL INTEGRATION AGREEMENTS IN AIR TRANSPORT SERVICES

Botswana has several bilateral agreements on air transport. The only one that is fully operational is the one with South Africa. Botswana's other operational bilateral agreement with Zimbabwe has Air Botswana as the only airline operating directly between Zimbabwe and Botswana. The rest of the bilateral agreements are not operational, with the London-Gaborone route having been terminated in 1999. Most of the bilateral agreements are with countries in Africa and Europe. These countries are: Kenya, Malawi, Namibia, South Africa, Zambia, Zimbabwe, Belgium, France, Germany, Netherlands, and United Kingdom. Botswana also has a bilateral agreement with Pakistan.

Botswana is also party to two multilateral agreements: The SADC Protocol on Transport and Meteorology and the Yamoussoukro Decision. One of the objectives of the SADC Protocol as pertains to air transport is to "overcome the constraints of small national markets, market restrictions and the small size of some SADC airlines and further to ensure global competitiveness of regional air services in a global context" (SADC, 1996, p 75).

The Yamoussoukro Decision is an Open Skies policy for Africa. Essentially this means that when the agreement is fully operational, African airlines could fly over or land in any of the territories of member states, meaning that there is an expanded market for airlines.

Baring implementation of both these multilateral agreements, there is ample opportunity for the airline industry and airlines like Air Botswana to take advantage of regional integration to further expand their operations.

2.8 EMPLOYMENT

In the year 2000, Air Botswana had a total staff complement of 311 people[5]. Of these, about 144 are employed in the provision of airport services. This makes 46% of the total labor force in the sector[6].

Foreign owned air services do not employ any significant amount of labor in the provision of airport services, 11 in the year 2000. In the year 2000, the average annual wage in the air transport sector was P 40-000 per person per annum.

2.9 INVESTMENT

Major investments in Botswana's air transport sector occur through two routes: government's equity financing of the airline and the airline's investment through the SITA investment plan. The SITA investment plan entails airlines making contributions to SITA, which specializes in aviation information and communication technology. Air Botswana thus has the benefit of using SITA's telecommunications lines for Air Botswana's reservation system.

Table 2.1: Investment by type and Amount in Botswana's air transport sector

	Type of Investment and Amount in Botswana Pula	
	Government of Botswana	**SITA Investment Plan**
1990	P16,796,363	P 294,197
1995	P35,000,000	P 241,509
2000	P35,000,000	P 296,000

Source: Air Botswana

5 Breakdown by category was unavailable

6 This figure excludes people hired by the Department of Civil Aviation. The section is dealt with separately earlier in the report.

Government's makes equity contributions to the airline as part of discharging its obligations, as the sole owner of the airline. With privatization imminent, it is likely that government's contribution to the upkeep of the airline is going to cost less, when the strategic partner to Air Botswana bears some of the costs of running the airline.

2.10 PRICES

Government of Botswana regulates air transport prices on the domestic route. On the international route market forces determine pricing. The airline gets most of its income from two major sources being passenger air fares and cargo and freight fares. While government does have a major price setting role for passenger services, the same cannot be said for cargo, which is determined by market forces.

2.10.1 Air fares

Passenger services are arguably Air Botswana's major revenue source. Becaus of government's role in price setting; there are no mechanisms for dealing with monopoly power/predatory pricing. Fare discounting is allowed on both local and international routes. There is a requirement that all stakeholders are consulted when there is policy and price changes in the sector. There is also a requirement that such changes are published in the Government Gazette. The table below presents market rates for the two important income sources for the airline, airfares and cargo fares.

Table 2.2: Passenger fare prices Air Botswana: Years 1996 and 2000

Route	Price				
	1996			2000	
	Pula	US $	Pula	US $	% CHANGE
Roundtrip standard economy class fare between Gaborone and Francistown	1024	281.3	1512	294.16	5
Roundtrip standard economy class fare to Johannesburg	766	210.4	1472	286.38	36
Roundtrip standard economy class fare to New York	8,846	2,430	17,063	3,319.65	37
Roundtrip standard economy class fare to London	7,108	1,953	13,229	2,573.74	32
Roundtrip standard economy class fare to Tokyo	9,300	2,555	17,967	3,495.53	37
Roundtrip business class fare to New York	10,174	2,795	21,647	4,211.48	51
Roundtrip business class fare to London	8,241	2,264	17,991	3,500.19	55
Roundtrip business class fare to Tokyo	11,325	3,111	21,855	4,251.95	37

Source Air Botswana

Between the country's two major cities of Francistown and Gaborone, Air Botswana does not operate differential classes (business or economy). It is all economy class. From the table it is noticeable that between the four years 1996 to 2000, the fares changed by only 5% on the route. This is attributable to government's role in price setting.

The Johannesburg-Gaborone route on the other hand changed by 36%, which is only 1% more than the average increase in prices for standard economy class fares to New York, Tokyo and Johannesburg.

When it comes to business trip fares, the increase in prices on the domestic market was even far lesser in comparison. The average price increase for business class trips to major world-wide cities was 48% for the period 1996-2000. However since Air Botswana does not have business class services and operates only to Johannesburg and Harare, it is difficult to make conclusive comparisons. However it does still seem that the airline has some leeway to raise its prices. Government's cash injection into the airline probably is the reason why it still remains profitable at such low prices, especially on the domestic routes.

2.10.2 Cargo Prices

Like airfares, government regulates cargo service fares on the domestic route. The practice is for Air Botswana to file charges for cargo service with the International Air Transport Associations, (IATA). Government's role then is to assess the fares and give their approval. Mostly government acts in accordance with Air Botswana's recommendations on the matter. The airline has a dedicated cargo service that was boosted by the airline's cargo service operations agreement, which allows Air Botswana to carry cargo for DHL, which is a world-wide courier company.

Table 2.3: Air Freight Charges- Air Botswana: 1996 and 2000

Service	PRICE				
	1996		2000		
	Pula/Kg	US $/ Kg	Pula	US $	% Change
Air freight rate between the two most important domestic cities	2.61	0.72	3.24	0.63	-12
Air freight rate to South Africa	1.22	0.34	6.63	1.29	285
Air freight rate to New York	22.15	6.1	42.47	8.623	36
Air freight rate to London	11.64	3.20	26.57	5.2	62
Air freight rate to Tokyo	20.43	5.60	39.43	7.8	37

Source: Air Botswana

2.11 QUALITY AND ACCESS TO SERVICES

In the years 1995-2000, trends show a general increase in the share of imports/exports carried by air, as well as internal movement of cargo by means of air transport. This demonstrates the gradual increase in importance of the sector in the movement of goods.

On international routes, Air Botswana carried a total of 106,294, people in 2001 as compared to a total of 110 246 in 1995. This compares to 68,274 passengers carried by the South African Airways in 2001, and 45, 763 in 1995. Both the domestic scheduled and international routes therefore demonstrate some growth in numbers in terms of moving people in and outside the country. Chartered private operators however demonstrated some declines in the years 1995-2000, with 45, 763 people in 2000 as compared to a total of 28, 862 moved in 1995 by chartered air travel services.

Cargo increased from 259, 910 Kg in 1995 to 524, 979 2000 Kg. Most of the cargo moved was from outside the country into Botswana. Domestic cargo movements declined from a peak of 214,200Kg in 1996 to 171,084Kg in 2000.

3 ROAD TRANSPORT

Road transport is the most commonly used mode of transport in Botswana. Botswana's tarmac road network leads to boarders with major trading partners in SADC; Namibia, South Africa and Zimbabwe. In 1998 the Trans-Kalahari Highway was completed, linking Botswana to Namibia. This road is also important because it links Botswana, South Africa, Zimbabwe and Namibia to the Maputo Corridor, thus bringing closer the stated ambition of SADC for integration of the road network. Tarred roads covered some 5000 kilometers in 1999. Tarmac and tracks make up to 20000 kilometers of road surfaces in the country. The tarmac road system also reaches most of Botswana's population centers.

This section will assess the state of the road transport sector in Botswana by analyzing policy and performance in the sector. This will be done through an assessment of market access, ownership, market structure, regulation, regional integration agreements, changes in policy, and employment in the sector.

3.1 MARKET ACCESS

Road transport, (perhaps for its relative cheaper setting-up costs as compared to air and rail transportation) is more predominant in Botswana. It is also the most liberalized of all transport services in Botswana.

For entry into the domestic road transport market, there are no policy restrictions to new entry among the commercially established operators except for passenger transport, where only citizens are allowed to operate. Otherwise for freight, special cargo[7], forwarding and cabotage[8] the transporter in question has to meet the relevant conditions set out in Botswana to qualify as a transporter in Botswana. For all these categories, no policy restrictions are imposed on firms with foreign participation, for so long as those firms are duly registered to operate in Botswana. There are no restrictions to entry into international transport by operators commercially established in Botswana.

The number of operators per specific service is not regulated by policy. The overriding necessity here is to obtain the relevant license to operate in the road transport services. This applies to freight, special cargo, forwarding and cabotage. Conditions applicable to local/domestic operations apply to international transport. Both domestic and foreign operators for passenger traffic, freight, special cargo, forwarding and cabotage require licenses to start operations in Botswana. There are no provisions for quotas for foreign operators.

There are no policy restrictions on the number of providers that may be active in any of the type(s) of service. Incumbent operators do not benefit from any preferential treatment to object to future increases in installed capacity or when increasing the number of vehicles.

[7] Special cargo in Botswana applies to among others, mineral transport, hazardous chemicals, explosives and animal products, petroleum products and armoury.
[8] The transfer of goods within two points in a country, none of which is in the territory of the transporter.

Company affiliation is not necessary for a license holder for entry into either of the passenger or freight business. As far as regulations on vehicles are concerned, the following apply[9].

i. For passenger services, there are regulations on the dimension and weight of the vehicle(s), there is an inspection system to monitor vehicle safety, and driving hours, but there are no regulations on fleet purchasing. Refer to Appendix 1 for detailed information[10].

ii. For freight transport, there are regulations on dimension and weight, regulations on inspection system to monitor vehicle safety, and some restrictions on driving hours, but there are no restrictions on fleet purchasing. The DRTS has the duty of managing and testing vehicles for the above mentioned tests. Currently though, the problem is that not all the necessary tests are performed by the DRTS, since some of the activities are performed by the Government Weighbridge.

iii. For special cargo, there are regulations on dimension and weight of vehicle, inspection system to monitor vehicle safety and driving hours as well as where to load and unload such cargo. There are no restrictions however on fleet purchasing.

In order to facilitate universal access for passenger transport, government provides incentives to transport operators operating to the remotest parts of the country where the national road network is yet to reach. Government donates an extra fee per-kilometer for the operators to such areas under the Rural Bus Subsidy Scheme.

3.1.1 Required Documentation

Besides the stipulated market access requirements, there is some documentation required by customs authorities when importing and exporting goods. Table 3.1 shows some of the documentary requirements applicable to operators from the SACU[11]:

Table 3.1: Documentation requirements for entering Botswana border, exporting and importing goods

Required documentation for general purposes	Customs requirements for importation of goods	Customs requirements for importation of goods

[9] A full schedule of these regulations is given at Appendix 1, for all the sub-sectors of road transport services. The schedule also shows the monetary fines applicable for violating the given limits.

[10] The Dimension and weight regulations stipulate the limits that a vehicle of a certain mass and lengths and breadths may operate. Regulations on driving hours stipulate the respective the time of day at which vehi cles carrying out certain operations may cease to operate. For instance, buses are expected to stop operating beyond nine in the evening.

[11] Conditions applicable to other (non-SACU) SADC members are outlined under section 3.5.3 Permit Requirements and Other Cross-Border Entry Matters

Original permit; Consignment note / Passenger list; Certificate of Road Worthiness; ID document; Professional Driving Permit (PDP); Passenger Service Vehicle (PSV); Valid passport; Certified copies of registration certificate of vehicle; Vehicle registration papers should be provided on demand in order to proof vehicle ownership.	Customs Union Permit (for stamping purposes); 2 Copies of Road Manifest; Original plus 1 copy of Commercial Invoice; Original plus 3 copies of Deferred tax form	Original and 1 copy of Form CD; Original and 1 copy of Commercial invoice; Original and 2 copies of CCA 1; Original copy of Combined manifest

Source: Department of Road Transport and Safety, Department of Customs and Excise

3.2 OWNERSHIP

Due to its more liberalized nature, road transport has more operators as compared to air transport. The sector has several sub-sectors, which include passenger transport, for domestic and international transport, special cargo, cabotage, and freight. There are also other components in the sectors such as taxi services.

Private ownership through commercial establishment is allowed without equity limitation for both existing operators and new entrants for freight, special cargo, forwarding and cabotage. However, for passenger transport, there are limitations on the number of passenger transport permits offered. This limitation is done in order to avoid market congestion, taxi violence and road accidents. Foreign ownership in the provision of services through commercial establishment is allowed, without any equity limitation for all the concerned sub-sectors, depending on successful application for registration in Botswana. This is with the exception of passenger transport, where it is only citizens who are allowed to run operations for domestic transport.

Currently government does not hold any equity stakes in the road transport business. However government has its own fleet of vehicles managed through the Central Transport Organization (CTO). The CTO manages the government fleet and performs repair and maintenance on the vehicles. The Organization’s fleet is used for matters purely pertaining to government business. Some of the activities of the organization that can be provided by the private sector have already been contracted out as evidence of government’s commitment to privatize some of its activities.

3.3 MARKET STRUCTURE

The road transport sector in Botswana reflects the liberalized nature of the sector. In the passenger transport sector, Bamangwato Coach Tours, T.J Motlogelwa Express, Naswi-Sech, Seabelo’s Express, JNG Express and View the World Tours are some of the more prominent commercially established operators on the domestic passenger routes. Though all of them could operate international routes, none currently offer such services. All the firms are privately owned.

Some of the major commercially established operators offering freight transport services in Botswana include Lob-Trans, Bots-Road, Truck-Africa and Draper Plant Hire. They are designated to operate both locally and internationally, which includes carrying out cross border operations. There are no restrictions to entry in terms of size of fleet. Because of that, small-scale operators defined as entities owning between 1 and 5 vehicles are allowed to provide both domestic and international/cross border services.

Forwarding services are dominated by DHL International, Federal Express, Elliot International, and Botswana Couriers. Botswana Couriers is a parastatal while the rest are completely private operations.

B.P Botswana (Pty) Ltd., Shell Oil Botswana, Lobtrans (all three provide petroleum products transportation) and Coin Botswana are some of the commercially established operators carrying out special cargo operations. While all of the first three transport (and produce) petroleum products, Coin Botswana transport transit cash.

3.4 REGULATION

The Department of Road Transport and Safety, (DRTS) regulates road transport. The DRTS was established in 1989 when the Transport Control Division was turned into a department. The Director of Road Transport and Safety who is assisted by the deputy director heads the department. The director has direct reporting lines to the permanent secretary, Ministry of Works and Transport. The department is composed of several divisions, each of which is in charge of some of the major operational areas of the department. These include Vehicle Registration and Licensing, Road Safety, Transport, Regulation and Promotion. Like most government departments, the DRTS is fully dependent on government for funding. In 2001, the department had a total of 913 economic and technical experts.

Government regulates tariffs for domestic passenger traffic. Fare discounting is not allowed for that particular service, though for the others such as special cargo, freight or international passenger transport as well as forwarding, government does not play any regulatory role as regards price setting. Government provides pricing guidelines to road companies only in the passenger traffic sub-department, in local transport. The rest of the sector is self-regulating in that regard.

It takes 3-4 months to process a license for passenger operators. It takes 1 day to process a license for freight operations and a similar timeframe for a special cargo license. Similar timeframes as applicable to local operators are applicable for foreign operators. Small operators get to wait for the same time periods as larger operators in the same categories. For the lack of cross-national information, it is difficult to compare Botswana's efficiency in this matter.

3.5 REGIONAL INTEGRATION AGREEMENTS IN ROAD TRANSPORT SERVICES

Article 6.2 of The SADC Protocol on Transport, Communications and Meteorology to which Botswana is a signatory acts as a framework on which the integration of the region's road traffic systems is based. The protocol includes some policy objectives such as:

- The harmonization of relevant road traffic and safety legislation
- Control measures in respect of vehicles, drivers and traffic operations; and,
- The harmonization and implementation of relevant technical standards (SADC, 1996, p 42).

Botswana's location, at the centre of the SADC region, makes the country ideal as the regional network transit centre for road transport. The completion of the Trans Kalahari Highway has further enhanced the goal of networking the region's roads. The Trans Kalahari corridor, links with the Maputo Corridor to the Northeast, bringing closer the goal to integrate the road network in the Southern African region. As part of Botswana's efforts towards regional integration, the country has signed some preferential agreements with other countries in the road transport sector. Other agreements are at a draft stage.

3.5.1 Memorandum of Agreement

Botswana has a Memorandum of Understanding, MoU, with Lesotho, Namibia, Swaziland and South Africa. The MoU is a multilateral transport agreement with other members of the Southern African Customs Union (SACU) and as it currently stands, the agreement allows journeys to be undertaken by truckers and other transport operators from SACU member states through the territory of members or to any point in the territory of any of the member states or in transit the territory of any member states. Some of the objectives of MoU are:

- to regulate the carriage of goods and convenience of passengers
- to achieve an equal distribution of permits
- to achieve and maintain an equitable non discriminatory infrastructure cost recovery system which shall not inhibit the operation of the MoU
- harmonised operating conditions

3.5.2 Draft Bilateral Agreements

According to the Ministry of Finance and Development Planning, it has been harder for Botswana to enter into bilateral road transport agreements with countries out of the customs union area (MFDP, 1997). This has clearly brought some challenges for the economic integration objective in SADC. As an example, during the National Development Plan 8 (1997-2003) period, Botswana had to revise its permit fee structure because foreign haulers paid as little as P50 to operate through Botswana while Botswana operators had to pay an equivalent of P 1600 in the other countries. The existing policy now is to charge fees on a reciprocal basis (MFDP, 1997).

In order to continue with the regional integration objective, two draft bilateral agreements with Zambia and Zimbabwe are under review and are expected to come into effect in the National Development Plan 9 period (2003 to 2009).

3.5.3 Permit Requirements and Other Cross Border Entry Matters

The MoU regulates transportation in the member states of SACU. Some of the applicable laws however need highlighting:

- Any vehicle originating in the SACU area does not require a license except where such vehicle carries nine people including the driver or if such a vehicle is for hire
- Cabotage is prohibited unless such cabotage passes through the country where the vehicle is registered

- A permit is required in the event where the gross weight of a vehicle exceeds 3.5 tons

To exit the Botswana border into South Africa and Namibia the following requirements apply:

- No inoculations are necessary
- Except for Mozambique and Angola, no visas are required for all SADC citizens
- No third party insurance is required for citizens of SACU
- All passenger lists and consignments must be stamped at the border

Designation into bilateral road transport operations in Botswana is the preserve of the Director, DRTS who has the administrative responsibility to award licenses to operate in Botswana. The following are some of the requirements that one must fulfill in order to become designated in bilateral agreements. These are based on the primary assumption that the country of origin of the operator in question has an existing bilateral agreement with Botswana.

i. Passenger transport: Cross border permits, passenger lists, drivers license for the designated driver(s) and certificates of roadworthiness for the fleet.

ii. Freight: cross border permit, weighing certificate, drivers license, roadworthiness certificate and consignment notes

iii. Special Cargo: Cross border permit, special permit

iv. Forwarding: Appropriate licenses

For both domestic and international transport services, it is necessary to obtain a relevant license to operate in the specific road transport services. This pertains to all the services listed, which encompass passenger, freight, special cargo, forwarding and cabotage.

3.6 PRICES

Pricing is crucial when it comes to accessibility of services. Government price regulation occurs mostly for passenger transport services while pricing for the rest of the services is market driven. The market determines prices for the rest of the services such as cargo, forwarding or cabotage. The table below shows the prices for certain services offered by road transport operators.

Table 3.2: Road transport services prices: Year 2002

Service	Amount in Pula
Roundtrip standard bus fare between Gaborone and Francistown	P 70
Roundtrip standard bus fare Johannesburg	P 140.00
Freight charges between Gaborone and Francistown	P45 KG and P5 per every other KG
Freight charges to Johannesburg	P135/KG

Source: Central Statistics Organization

A round trip fare between two of the most important cities in Botswana, Francistown and Gaborone costs only P70, which is half the amount, charged on the Gaborone-Johannesburg route. What is important about this is that Gaborone and Francistown is approximately the same distance as Francistown-Johannesburg. Hence government's tight control of pricing for passenger transport could explain the discrepancy in the service charges between the different places. The issue that arises out of this scenario is whether government's objective of making transportation accessible to a majority of citizens made at the expense of economic profitability for operators? Yet on the other hand, major local operators do not seem interested on operating the lucrative foreign services if their lack of taking up operations on the international operations is anything to go by. Possibly stringent regulatory conditions in the other countries could explain this. Another explanation could be that local operators are under-capitalized.

Freight charges also show a discrepancy in charges, with operations to Johannesburg being more lucrative for operators as compared to operating to local destinations.

3.7 CHANGES IN POLICY

Botswana's road transport sector has undergone some transformations in the recent past. Some are planned for the future. The changes occur in the spheres of domestic liberalization, implementation of regional integration road transport agreements, and privatization of state-owned transport machinery and infrastructure. These changes are:

i. Privatization of some functions of the CTO: The CTO is a government department in charge of management, repair and maintenance of the government fleet. Government is already contracting out some of the functions of the CTO.

ii. Expansion of carrying capacity: For the purposes of environmental protection as well as safety reasons, government plans to phase out the use of public carriers with a capacity of 16 passengers in favour of ones with a carrying capacity of 25 people.

iii. Computerization of the Vehicle Registration and Licensing System (VRLS): This entails capturing vehicles in the country in a centralised computer database system. In the past, cars were registered on the basis of region/district. The new system is national in approach and thus ensures ease of management of the vehicles in the country.

iv. Introduction of metered taxis: Government plans to introduce a system where taxi operations will be using a metering system for purposes of charging.

v. Legislative means to reduce drunken driving: This will allow for only 50g/100 ml of blood as the maximum limit for blood in the alcohol. There is also now zero tolerance for public transport passenger drivers, making it lawful for police officers to demand for blood alcohol test when in suspicion

vi. Reduction in waiting time for buses: On the major routes, 30 minutes is now the target as waiting period for buses as opposed to the previous waiting period of 1 hour.

vii. Botswana has adopted the K 53 driver testing system, which is a SADC harmonised method of driver testing.

3.8 EMPLOYMENT

Realizing increased employment in the road transport sector is one of the key strategies of ensuring that the sector contributes to the economy beyond the facilitation of movement of goods between Botswana and other countries. The following figures illustrate the employment trends in the road transport sector and related services. Note that figures for 1990 do not exist, and that figures for 1995 are not as dis-aggregated by sub sector as are those for 2000. This is due to developments in the sector in recent years.

Table 3.3: Employment figures in road transport: 1990 and 2000

Employment Indicator	1990	2000
Total employed by national road transport companies	1,823	4,225
Share employed by foreign operators (% of total)	31%	-
Annual Wage in industry	P 1,264	P 2,787

Source: C.S.O.

4 Conclusions and Recommendations

4.1 CONCLUSIONS

i. Market access into the air transport sector in Botswana is quite restrictive as compared to road transport. This is more so with regard to operations in the scheduled domestic air transport services and the international air transport services. In the latter, Air Botswana and South African Airways are the only two airliners operating to and from Botswana while Air Botswana alone operates the domestic scheduled air transport market.

ii. Ownership in the air transport sector is also strictly regulated. Government of Botswana wholly owns the country's flag carrier, Air Botswana, which is one of the few profitable airlines in Africa. The impending privatization of the airline in 2003 represents an opportunity towards enhanced profitability, as the corporation's operations are quite professional. For instance, Air Botswana Engineering performs most of the engineering and maintenance duties for the local air transport industry as well as occasionally sub-contracting for other regional airlines. Thus the airline's diversified business activities promise for a smooth transformation into privatization for the airline.

iii. Road transport on the other hand is quite liberalized. State ownership of operations in road transport occurs only through the CTO, which manages the government fleet. Having already started sub-contracting some of the duties of the CTO, government is moving in the right direction-that of reducing the financial burden on the government while simultaneously stimulating private initiative in the sector.

iv. Government is considering setting up a Civil Aviation Authority, which will deal with regulating the air transport sector. The authority, which will come about as a result of the restructuring of the current regulatory authority, the DCA will be independent of government.

v. The delayed actualization of the provisions of the Yamoussoukro Decision by Civil Aviation authorities in Africa represents an opportunity for the restructured Air Botswana. The airline could take advantage of the expanded market once it is privatized, to extend its services to most of the African countries.

vi. For road transport, the Memorandum of Understanding holds a lot of potential benefits to transport operators in Botswana. Botswana based operators therefore could exploit the relatively liberal transportation regime provided by the MoU to expand their operations in the region.

vii. The air transport sector employs far less people than the road transport sector, with the latter employing close to 5000 people in the year 2000 while the former accounted for only 400 people. However, the average wage in the air transport sector is higher at P 40, 000 per employee per year in 2000 compared to only P 2, 827 in the road transport sector in the same year.

viii. Regulation of prices in international air transport is minimal since the market dictates, and Air Botswana, being such a small player is, by necessity, a price taker. Government does have a regulating role though minimal for airfares in the domestic air transport market, thus making traveling internally comparatively quite cheaper. Government however stringently regulates passenger transport fares domestically.

ix. Road transport operations to the rest of the region in both passenger transport and freight are far more lucrative than local operations even if it is over the same distance.

4.2 RECOMMENDATIONS

i. Co-operation with other countries is very important in transport. Botswana needs to proceed with identifying co-operating partners in the field of transportation in order to expand the horizons for trade in the transport business and enhance movement of persons. The nature and scope of such co-operation however differs in emphasis between the two modes of transport:

   a. For road transport, regional agreements supersede other types of agreements in importance because of Botswana's proximity to the countries in the region. Such agreements also enhance Botswana's attractiveness as a hug for the regional road transport network

   b. For air transport however, continuing to pursue bilateral agreements, which is dictated to by existing global regulations on the matter still holds importance. However, Botswana's challenge on the matter is ensuring that existing bilateral agreements especially in Africa are fully exploited for business since they represent unused potential.

ii. Transport of goods and people to South Africa and presumably other neighboring countries is more attractive economically as compared to transporting domestically. While government does have a duty to ensure universal access by keeping prices at an affordable rate, such prices must be reviewed more often to enhance profitability for local operators which could also enhance their ability to expand into regional operations, something that is lacking at the moment.

iii. Air Botswana has realized profitability in each one of the last six years. As the airline prepares for privatization therefore, it is not from a crisis perspective. This makes for a good opportunity for the airline to take advantage of the privatization process to expand its market base as well as attain enhanced profitability.

iv. New developments in the air transport such as the Yamoussoukro Decision represent ample opportunity for profitability and the airline, starting from a position of strength such as it is in now must aggressively look towards capturing more of the market. The airline also has a strong engineering wing; Air Botswana Engineering which often gets external contracts due to their competence. Further exploiting such strengths ought to lead to higher profitability in future.

v. With the coming of privatization, there will be a need to liberalize air transport services in Botswana and between Botswana and Johannesburg. Evidence from the section on pricing demonstrates that the routes operated by more airlines had a higher average increase in prices. This could also be attributable to lack of state intervention. However, what is important to point out here is prices on domestic operations are artificially low and therefore are likely not to be reflective of market realities. Liberalizing prices and thereby reducing government role in the matter will make for effective competition and lower prices.

vi. Government needs to look into why fewer of local transport operators take up the opportunity to operate to South Africa and other neighboring countries. Is it because of stringent regulatory requirements in the other country(s), which make it difficult for local operators or for other reasons? In this way, government will better engage at bilateral level with other counterparts or perhaps find other ways of assisting local transport operators to access the lucrative regional routes easier.

vii. The DRTS needs to be enhanced as the entity in charge of road transport regulation. Consolidating such duties as overload control and weigh-bridge management which are all done by departments in the Ministry of Works and Transport could lead to more efficiency which ought to enhance administration of road transport affairs in Botswana.

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APPENDIX A: REGULATION ON LOAD LIMITS

Legal Load Limits

AXLE	Limit in Tons
Steering	7. 7
Single	8.2
Tandem	16.4
Tridem	24.6
Combination Maximum	50.2

Fines Payable In Respect Of Overloaded Goods Vehicles:

SINGLE AXLE WEIGHT TONS	PENALTY (Pula)
6 – 9.5	250
9 5 – 10.5	400
10 5 – 11.5	600
11 5 – 12.5	900
12 5 – 13.5	183
14 5 – 15.5	2500

Legal Dimensional Limits

DIMENSIONS	LIMIT in meters
Width	2.5
Height	4.1
Length	12
Articulated	17
Combination Length	22

APPENDIX B: AIR TRANSPORT

Note: Unless specified, please give information for the latest year available and indicate which year. If insufficient space is provided, please attach additional information on separate sheets. Please report all monetary values in their reported currencies. Within this section of the questionnaire, two concepts will be frequently encountered: commercial presence and cross-border supply. They are alternative modes of supply and are defined by the WTO in the context of the GATS schedules of commitments. To avoid confusion, a preliminary discussion of the two concepts is necessary. Foreign suppliers provide services according to the "cross-border" mode if they operate from their own country without establishing a local branch or subsidiary or acquiring shares in a firm located in the country to which the service is destined. The "commercial presence" mode of supply means exactly the contrary, i.e. the foreign firms establish locally in the country where they want to supply the service and open a branch, subsidiary or participate to the capital of a local firm (the share can go up to 100%).

Market Access

Commercial presence

1. Are there policy restrictions to new entry (refer only to commercially-established operators)?

Service	Entry by any Firm	If yes, total number of firms allowed	Entry by firms with foreign participation[12]	If yes, number of firms with foreign participation allowed
International air transport[13]	✓No Yes		☐ No ☐ Yes	
Domestic air transport	No ✓Yes	Only 1, Air Botswana, can operate the local scheduled routes.	☐ No ✓ Yes	Unspecified. Aircraft's need first to be registered in Botswana.
Provision of fuel	☐ No ✓ Yes	1 (B.P. Botswana)	☐ No ✓ Yes	
Luggage and freight loading and unloading	✓No Yes		✓ No Yes	Air Botswana enters into sub-contracts for this type of activity, for instance as with Air Namibia in Man Airport
Aircraft repair and maintenance	☐ No ✓Yes		☐ No ✓ Yes	1 (Air Botswana Engineering)
Selling and marketing of air transport services[14]	☐ No ✓Yes		☐ No ☐ Yes	
Computer reservation system	☐ No ✓Yes		☐ No ☐ Yes	

[12] This category also includes branches and subsidiaries of foreign suppliers.
[13] Include designation among restrictions.
[14] Refers to selling and marketing activities undertaken by the airline company itself (GATS definition).

2. If entry is restricted, what are the reasons provided by the government?
Use the definitions below to fill in the table:

1—To give protected operators time to prepare for competition. If so, please specify time.
2—To increase government revenue from privatization or license fees
3—Exclusive rights believed necessary to attract (strategic) investment If so, please specify time given.

4—It is believed that market can sustain only a limited number of operators
5—Strategic activity reserved to the state

	Reasons					
Service	1	2	3	4	5	Other (describe in brief)
International air transport	✓					
Domestic air transport				✓		
Provision of fuel						
Luggage and freight loading and unloading				✓		
Aircraft repair and maintenance				✓		
Selling and marketing of air transport services						
Computer reservation system						

Cross-border supply

3. Are there restrictions on cross-border entry of foreign airlines on the scheduled air transport market?

☐ No✓Yes

If yes, what are the instruments used to implement restrictions?

✓Air Services Agreements (ASAs)
☐ Other: ____

4. Are there restrictions on cross-border entry of foreign service providers on the non-scheduled (charter) air transport market?

	Entry by foreign firm	If yes, total number of foreign providers allowed
International air transport	✓No ☐ Yes	
Domestic air transport	✓No ☐ Yes	

5. If entry is restricted, what are the reasons provided by the government?

	Scheduled services	Non-scheduled services
To prepare incumbent airline(s) for competition:		☐
Market is believed to sustain a limited number of airline(s)	✓	☐
Other (explain)		

6. Are there restrictions to cross-border supply of computer reservation system (CRS) services by foreign suppliers?

☐ No ? Yes If yes, please specify:

To encourage Air Botswana in the same business activity.

7. Bilateral Air Service Agreements (ASAs)

Type of bilateral ASAs	Number of signed bilateral ASAs	Number of operational bilateral ASAs
Predetermined (TP)[15]	13	1
Bermuda (B)[16]	-	-
"Point to Point" Open Skies (POS)[17]	-	-
"Multiple Point" Open Skies (MOS)[18]	-	-
Other		

8. Please list the countries with which (bilateral) Open Skies Agreements have been signed: France, Belgium, Zambia, Zimbabwe, United Kingdom, South Africa, Namibia, Netherlands, Malawi, Kenya, Pakistan, Germany

9. Is the country member of any plurilateral open skies agreement group?

✓No ☐ Yes If yes, please list other members of the group:

10. Please fill in the following information referring to clauses in operational ASAs:

a) Tariff clauses in ASAs

	Total number of bilateral ASAs	Total number of plurilateral open skies agreement groups[19]
Double approval[20]	All 13	-
Country of origin[21]	None	-
No approval needed	-	-
Double disapproval[22]	-	-
Other mechanism of setting tariffs (please describe in brief)		

b) Capacity clauses imposed on foreign airlines

[15] each country designates one single company to operate on the bilateral route; limited number of points/routes operated by designated airlines as listed in the bilateral's annex; capacity and frequency to be agreed ex ante; few 5th freedom granted
[16] each country designates one or several airlines on each route; limited number of points/routes operated by designated airlines as listed in the bilateral's annex; there is no ex ante capacity control on each route, capacity offered is often negotiated via commercial agreements between airlines; several 5th freedoms may be granted, but total capacity must be proportional to the needs of the main bilateral route
[17] multiple designation of airlines; free access to designated routes, between specific points, either departure or arrival points may be left open and unrestricted; no frequency or capacity control; extensive 5th freedom rights are granted
[18] multiple designation of airlines; airlines can fly on any route between two states; no frequency or capacity control; unrestricted 5th freedom
[19] Include air transport liberalization within EU in this category.
[20] Both states must approve a tariff.
[21] Only the state in which the transportation originates needs to approve the tariff.
[22] Both states concerned must disapprove a tariff to prevent it from coming into effect.

	Total number of bilateral ASAs	Total number of plurilateral open skies agreement groups
No capacity constraints		
Capacity constraints		

c) Number of foreign airlines designated

	Total number of bilateral ASAs	Total number of plurilateral open skies agreement groups
Single	13	-
Double	-	-
Multiple	-	-

d) Routes specification for the foreign airlines

	Total number of bilateral ASAs	Total number of plurilateral open skies agreement groups
Routes not specified		
Routes specified	All 13	-

e) Freedoms of the air granted to foreign airlines

	Total number of bilateral ASAs		Total number of plurilateral open skies agreement groups	
	Unrestricted freedom	Restricted freedom	Unrestricted freedom	Restricted freedom
Third freedoms[23]	-	All 13	-	-
Fourth freedoms[24]	-	All 13	-	-
Fifth freedom[25]	-	5	-	-
Sixth freedom[26]	-	-	-	-
Seventh freedom[27]	-	-	-	-
Cabotage[28]	-	-	-	-

Ownership

11. Is private ownership in the provision of services through commercial establishment allowed?

Services	Existing Operators	Maximum private equity permitted (%)	New entrants	Maximum private equity permitted (%)
International air transport	☐ No✓ Yes		✓No ☐ Yes	100 %, applicable to airlines originating

23 The right of an airline of one country to carry traffic (passenger, cargo, mail) from its country to another country.
24 The right of an airline of one country to carry traffic (passenger, cargo, mail) from another country to its own country.
25 The right of an airline of one country to carry traffic between two other countries providing the flight originates and terminates in its own country.
26 The right of an airline of one country to carry traffic between two other countries via its own country.
27 The right of an airline of one country to carry traffic between two other countries without the flight originating or terminating in its own country.
28 The right of an airline of one country to carry domestic traffic between two points within the territory of another country.

			from countries which have an existing bilateral ASA with Botswana. Only the one with South Africa is functional though.
Domestic air transport	☐ No ✓Yes	✓ No ☐ Yes	100 %. This figure applies to non-scheduled travel only. Scheduled transport services is Air Botswana's monopoly
Provision of fuel	☐ No ✓Yes	✓No ☐ Yes	
Luggage and freight loading and unloading	✓ No ☐ Yes	☐ No✓ Yes	Subject to negotiation with Air Botswana
Aircraft repair and maintenance	✓No ☐ Yes	☐ No✓ Yes	Subject to negotiation with Air Botswana
Selling and marketing of air transport services	☐ No ✓Yes	☐ No ? Yes	Not Applicable
Computer reservation system	✓No☐ Yes	☐ No ☐ Yes	Not Applicable

12. Is foreign ownership in the provision of services through commercial establishment allowed?

Services	Existing Operators	Maximum foreign equity permitted (%)	New entrants	Maximum foreign equity permitted (%)
International air transport	✓No ☐ Yes	Can be 100% if there exists a bilateral ASA with country of origin.	☐ No ✓Yes	100%
Domestic air transport	✓No Yes	100	No ☐ Yes	
Provision of fuel	✓No☐Yes	100	No ✓ Yes	
Luggage and freight loading and unloading	No ✓☐ Yes	100	No ✓Yes	Subject to contractual stipulations
Aircraft repair and maintenance	No ✓☐ Yes		✓No ☐ Yes	Exclusive to Air Botswana Engineering
Selling and marketing of air transport services	No☐ Yes ✓		☐ No✓ Yes	100
Computer reservation system	No ✓☐ Yes		☐ No✓ Yes	100

13. Does the government have a special government voting right in the airlines?
☐ No ✓Yes

14. Please mark in the table below, the appropriate ownership structure for the 5 most important international airports in terms of traffic:

Assets ownership/Service provision	Airports				
Publicly owned/publicly operated	Sir Seretse Khama International	Maun International Airport	Kasane Airport	Francistown Airport	Selibe Phikwe

	Airport				
Publicly owned/ privately operated (e.g., by concession)					
Privately owned/privately operated					

Market Structure

15. Please list below the characteristics of all commercially-established carriers operating on domestic and international routes.

Name	Year carrier first offered services	Designated to provide international services	Market share		Owners of capital and their respective shares (domestic/foreign)
			Nat-ional	Inter-national[29]	
Air Botswana	1988	☐ No ✓Yes	100 %	60%	Government of Botswana
South African Airways		☐ No✓Yes	-	40%	South Africa

16. a) Do commercial carriers participate in international carrier alliances?

☐ No ? Yes If yes, please specify alliance(s) and partner airlines: nership with South African Airways

b) Do commercial carriers participate in codesharing agreements?

☐ No ? Yes If yes, please specify partner airlines:

17. Please indicate the total number of foreign airlines providing the following services cross-border:

Services	Scheduled services	Non-scheduled services
International air transport	South African Airways	Not Available
Domestic air transport	0-This is the exclusive duty of Air Botswana.	Foreign aeroplanes need to obtain a temporary air service permit, so the number is ad-hoc, and restricted to strictly non-scheduled flights

18. Please indicate the total number of commercially-established operators providing the following services in the main international airport:

Services	Total number
Provision of fuel	1
Luggage and freight loading and unloading	1
Aircraft repair and maintenance	2
Selling and marketing of air transport services	0
Computer reservation system	1

19. Please list the characteristics of the 6 most important commercially-established operators for the following services:

	Year of service		Owners of capital and their respective shares

[29] Percentage of international passengers transported to/from the country

Name of firm	commencement	Market share	(domestic/foreign)
Provision of fuel			
B.P has the exclusive right to provide fuel for Air Botswana		100% for scheduled air travel services	
Luggage and freight loading and unloading			
Air Botswana , Air Namibia (in Maun only)	1986 for Air Botswana, unknown date for Air Namibia		Air Botswana-100 % locally owned, Air Namibia-100% foreign owned
Aircraft repair and maintenance			
Air Botswana Engineering	*1986*		*100% local owned.*
Selling and marketing of air transport services			
Air Botswana, South African Airways			
Computer reservation system			
Air Botswana, South African Airways, Kudu Travel			
20. Capacity of the main international airport a) How many passengers can the terminal building handle at the peak hours? 136 b) Apron capacity: 17 aircraft			

Regulation

21. Institutional status of sector regulator		
	For carriers	For airports
When was the regulator established?	1978	1978
Is the regulator an institutionally independent agency?[30]	✓No ☐ Yes	✓No ☐ Yes
How is the sector regulator financed? License and other fees State budget	100%	100%
How many technical and economic professionals are employed?	817	
22. What are the main requirements that an airline must fulfill in order to become an international carrier and have the right to be designated in ASAs?		
23. How are flight and gate slots allocated in airports? ☐ By grandfathering rights ☐ By slot auction		

30 "Institutionally independent" means that the regulator is not part of the ministry and is not linked to the operating entity (national airlines/airports).

☐ By a combination of grandfathering rights and slot auction
☐ By authorities discretion
☐ By flag carrier discretion
☐ By airport discretion
☐ By IATA guidelines
? Other: Allocation of gate slots is done according to the timetable of landings/departures of user airlines.

24. Carrier alliances

a) Are alliances and other carrier agreements allowed? ☐ No ✓Yes
b) Are carrier agreements exempted from competition law? ☐ No ✓Yes
c) Is codesharing allowed? ☐ No ✓Yes

25. Price regulation

a) Does the government regulate airfares?
On domestic routes ☐ No ✓Yes
On international routes ☐ No✓Yes

b) If yes to a), is fare discounting allowed?
On domestic routes ☐ No ✓Yes
On international routes ☐ No ✓Yes

c) If no to a) how are abuse of monopoly power and/or predatory pricing dealt with?

26. Allocation of licenses for commercially-established operators providing air transport services

a) If the number of providers is not restricted by policy, specify the main conditions, including important licensing requirements, that the new entrants must fulfill:

Service	Payment of license fee (indicate amount in local currency)	Other (describe in brief)
International air transport	Restricted	
Domestic air transport	Restricted	This is an exclusive monopoly of Air Botswana
Provision of fuel	Restricted	Restricted to B.P
Luggage and freight loading and unloading	Restricted	Air Botswana or its elected sub-contractors may only participate in this activity
Aircraft repair and maintenance	Restricted	Restricted to Air Botswana Engineering
Selling and marketing of air transport services	Restricted	While restricted, several are operational in the country
Computer reservation system	Restricted	

b) If the number of providers is limited by policy, through what mechanism are licenses allocated?

Service	Competitive tender	First come, first served	Public hearings	Other discretionary mechanism	Other (describe in brief)
International air transport	☐	☐	☐	☐	existence of bilateral
Domestic air transport	☐	☐	☐	✓	Application for air transport license

Provision of fuel	?	☐	☐	☐	Open
Luggage and freight loading and unloading	☐	☐	☐	✓	Subject to Air Botswana management's decision
Aircraft repair and maintenance	☐	☐	☐	☐	Exclusive to Air Botswana
Selling and marketing of air transport services	☐	☐	☐	☐	Exclusive to Air Botswana
Computer reservation system	☐	☐	☐	☐	BASAs are required.

27. Public consultation and transparency

a) Which of the following are consulted in advance of regulatory decisions?

? Service providers
? Consumer groups
? User industries
☐ Other: All stakeholders

b) How are laws and regulatory decisions made public?

☐ Published on the regulator's website[31]
? Published in an official gazette
☐ Other: ______________________

Past and Future Changes in Policy

28. Please indicate major changes in market access policies, ownership rules, and regulation since 1990 (e.g., domestic liberalization, implementation of open skies agreements, joining of regional agreements on air transport, privatization of state-owned airlines and airport facilities etc.) Please attach copies of laws and regulations.

29. Please indicate announced or anticipated changes in the same areas.

Area of policy change (market access, ownership or regulation)	Anticipated date	Description of change
Ownership	2002	Government will cease to have absolute ownership of the airline (Air Botswana)
Regulation	2001	Expansion of terminal capacity regime Government is investing in the expansion of major airports of SSKA, Maun, and Kasane.
Installation of radar equipment at major airports	2001	The installation of both area radar and approach radar at the major airports and the interface of Maun Airport radar with Gaborone (SSKA) radar.

Subsidies and Universal Service

30. How does the government define universal service (or universal access)?
31. Does the government subsidise domestic airlines? ?No ☐ Yes If yes, please indicate the airlines.
32. Has the government covered operational losses of airlines in the past five years? ?No ☐ Yes If yes, please indicate the amount in 1995 and in 2000.
33. Does the government oblige large national airlines to provide universal service? ?No ☐ Yes

[31] The regulator does not have a website.

Regional Integration Agreements in Air Transport Services

34. Please indicate if there are any preferential arrangements affecting air transport services, and list the preferential measures.

Name of agreement	Partner country(s) in agreement	Date of entry into force	Preferential measures
None Exist			

Employment

35. Main employment indicators (for the years 1990-2000).

How many people are employed by the main national carrier? **311**
How many people are directly employed in the provision of airport services? **144**
What share of the total labor force is directly employed in the provision of airport services? **46%**
What share of workers is employed by foreign-owned operators providing airport services? None
What is the annual average wage in this sector? P 40 000 per annum

If time-series data from 1990 to 2000 is not available, please collect indicators for the years 1990, 1995 and 2000.

INVESTMENT

	Type of Investment and Amount in Botswana Pula	
Year	Government of Botswana	SITA Investment Plan
1990	16 796 363	294 197
1995	35 000 000	241 509
2000	35 000 000	296 000

Prices

37. Please fill in the table below. If possible distinguish between season and off-season airfares. For a comprehensive assessment of air transport performance, it would be extremely useful to have historical data on prices and/or price indices for the various services. If time series data are available, please attach them separately (preferably electronically).

Service	Price (in local currency)[32] (1996)	Date	Comments
Roundtrip standard economy class fare between the two most important domestic cities	P 1512 P 1024	2000 1996	
Roundtrip standard economy class fare to neighbouring country: South Africa (Gaborone-Johannesburg)	P 1472 P766	2000 1996	
Roundtrip standard economy class fare to New York	P 17063 P 8846	2000 1996	

[32] Note: No information is readily available for the years 1990 and 1995. Data provided in brackets is for the year 1996.

Roundtrip standard economy class fare to London	P 13229 P 7108	2000 1996	
Roundtrip standard economy class fare to Tokyo	P 17967 P 9300	2000 1996	
Roundtrip business class fare between the two most important domestic cities	N/A. This type of service does not exist on the domestic market.		
Roundtrip business class fare to neighboring country:________________	P1656 (P 874)	2000 (1996)	
Roundtrip business class fare to New York	P21647 P10174	2000 1996	
Roundtrip business class fare to London	P17991 P 8241	2000 1996	
Roundtrip business class fare to Tokyo	P21855 11325	(2000) 1996	
Air freight rate between the two most important domestic cities	P3.24 P/Kg P 2.61 P/Kg	2000 1996	
Air freight rate to neighboring country:__________________	P 6.63 P/Kg P1.22 P/Kg	2000 1996	
Air freight rate to New York	P42.47 P/Kg P22.15 P/Kg	2000 1996	
Air freight rate to London	P26.57 P/Kg P 11.64 P/Kg	2000 1996	
Air freight rate to Tokyo	P39.43P/Kg P20.43 P/Kg	2000 1996	

Quality and Access to Services

Indicator	Value		Date
Share of exports/import carried by air			
Number of departures and landings in a peak day for the most important international airport	20		2001
Number of departures and landings in a peak hour for the most important international airport	Not Applicable. Air Botswana does not record “peak” hour rates at the Sir Seretse Khama International Airport, rather they keep only the “peak” day rates		
Number of passengers carried on domestic routes by			
*national airlines	46521	2001	
*foreign airlines	Not applicable. Air Botswana hold the monopoly of the domestic scheduled transport market.		
Number of passengers carried on international routes by:			
*national airlines	121495	2001	Passengers
*foreign airlines[33]	31015	2001	
Freight carried on domestic routes by:			
*national carriers	175	2001	Tons
*foreign carriers	No foreign carriers carry any cargo on the domestic routes.		
Freight carried on international routes by:			
*national carriers	570	2001	
*foreign carriers	No foreign airlines are allowed to carry any cargo on the Gaborone-Johannesburg route.		
Percentage of on-time flights at main international airport	Data not available		

[33] Number is estimate, and therefore subject to confirmation with SAA.

APPENDIX C: ROAD TRANSPORT

Note: Unless specified, please give information for the latest year available and indicate which year. If insufficient space is provided, please attach additional information on separate sheets.
Please report all monetary values in their reported currencies.

The scope of this questionnaire is long-distance road passenger and freight transport. The long distance in the questionnaire is segregated into domestic inter-city transport and international inter-city transport. It intends to identify the degree of openness, market structure, regulatory structure, and the level of performance of such road transport. It again clarifies that intra-city road passenger (both bus and taxi) and freight transport are not covered by this questionnaire. Information on intra-city road transport, if necessary ought to be obtained through a separate questionnaire on urban transport.

Within this section of the questionnaire, two concepts will be frequently encountered: **commercial presence** and **cross-border supply**. They are alternative modes of supply and are defined by the WTO in the context of the GATS schedules of commitments. To avoid confusion, a preliminary discussion of the two concepts is necessary. Foreign suppliers provide services according to the "cross-border" mode if they operate from their own country without establishing a local branch or subsidiary or acquiring shares in a firm located in the country to which the service is destined. The "commercial presence" mode of supply means exactly the contrary, i.e. the foreign firms establish locally in the country where they want to supply the service and open a branch, subsidiary or participate to the capital of a local firm (the share can go up to 100%).

A. Market Access

Commercial presence

a. Domestic road transport

1. Are there policy restrictions to new entry (refer only to commercially-established[34] operators)?

Service	Entry by any firm	If yes, total number of firms allowed	Entry by firms with foreign participation[35]	If yes, number of firms with foreign participation allowed
Passenger	✓No☐Yes		✓No☐Yes	
Freight	✓No☐Yes		✓No☐Yes	
Special cargo[36]	✓No☐Yes		✓No☐Yes	
Forwarding[37]	✓No☐Yes		✓No☐Yes	
Cabotage	✓No☐Yes		✓No☐Yes	

[34] The term commercially-established refers to locally-established operators.
[35] This category also includes branches and subsidiaries of foreign suppliers.
[36] It is found that some countries define categories of special cargo and set out a different regulatory regime for the special cargo. For instance, Mexico includes seven categories in the special cargo: hazardous materials, petroleum and its derivatives (via liquid tanker trucks), automobiles direct from the factory (via specialized vehicles), tow-trucks, tow-trucks for salvage vehicles, industrial cranes, and securities of credit-related institutions (via armoured vehicles). This special cargo is subject to the special cargo regulatory regime, which shapes differently from that of general cargo. If your country has such special cargo with its regulatory regime, please specify what "special cargo" includes.
[37] Forwarding includes cargo handling services in federal areas, customs facilities and border crossing (drayage services) as well as container handling.

2. If entry is restricted, what are the reasons provided by the government?							
Entry is not restricted. Use the definitions below to fill in the table: 1—To give incumbent operators time to prepare for competition. If so, please specify time given. 2—To increase government revenue from privatization or license fees 3—Exclusive rights believed necessary to attract (strategic) investment. If so, please specify time given 4—It is believed that market can sustain only a limited number of operators 5—Strategic activity reserved to the state. 6—To protect the regulated rail industry.							
	Reasons						
Service	1	2	3	4	5	6	Other (describe in brief)
Passenger							
Freight							
Special cargo							
Forwarding							
Cabotage							

3. Is any of the following constraints in place:

(i) complete prohibition of cabotage ? ☐ No ☐ Yes

(ii) limitations on cabotage ☐ No ? Yes (Cabotage may only carried with corroborated evidence from user departments, ministries, or registered companies in Botswana). Where such cabotage is in transit through Botswana, there are strict orders that it be out of the country in the stipulated time).

(iii) restrictions on the possibility for foreign firms to pick up passengers or freight ? No ☐ Yes

b. International road transport

4. Are there policy restrictions to new entry (refer only to commercially-established[38] operators)?				
Service	Entry by any firm	If yes, total number of firms allowed	Entry by firms with foreign participation[39]	If yes, number of firms with foreign participation allowed
Passenger	✓No☐Yes		✓No☐Yes	
Freight	✓No☐Yes		✓No☐Yes	
Special cargo[40]	✓No☐Yes		✓No☐Yes	
Forwarding	✓No☐Yes		✓No☐Yes	

[38] The term commercially-established refers to locally-established operators.

[39] This category also includes branches and subsidiaries of foreign suppliers.

[40] It is found that some countries define categories of special cargo and set out a different regulatory regime for the special cargo. For instance, Mexico includes seven categories in the special cargo: hazardous materials, petroleum and its derivatives (via liquid tanker trucks), automobiles direct from the factory (via specialized vehicles), tow-trucks, tow-trucks for salvage vehicles, industrial cranes, and securities of credit-related institutions (via armoured vehicles). This special cargo is subject to the special cargo regulatory regime, which shapes differently from that of general cargo. If your country has such special cargo with its regulatory regime, please specify what “special cargo” includes.

5. If entry is restricted, what are the reasons provided by the government?							
Use the definitions below to fill in the table: 1—To give incumbent operators time to prepare for competition. If so, please specify ime given. 2—To increase government revenue from privatization or license fees 3—Exclusive rights believed necessary to attract (strategic) investment. If so, please specify time given 4—It is believed that market can sustain only a limited number of operators 5—Strategic activity reserved to the state. 6—To protect the regulated rail industry.							
Service	Reasons						
	1	2	3	4	5	6	Other (describe in brief)
Passenger							
Freight							
Special cargo							
Forwarding							

6. Is there a complete prohibition of the drayage services to cross the border. ? No ☐ Yes

Cross-border supply

7. Are there restrictions on cross-border entry of foreign service providers on the road transportation market? If yes, what are the instruments used to implement restrictions?					
U: Unilateral restrictions B: Bilateral road freight agreements R: Regional integration agreements Other (please briefly describe)					
Services	Restrictions	Type of Restrictions			
		U	B	R	Other
Passenger	No✓Yes			✓	
Freight	No✓Yes			✓	
Special cargo	No ✓Yes			✓	
Forwarding	No✓Yes			✓	

8. If entry is restricted, what are the reasons provided by the government?				
Use the definitions below to fill in the table: 1—To give incumbent operators time to prepare for competition. If so, please specify time given. 2—It is believed that market can sustain only a limited number of operators 3—To protect the regulated rail industry.				
Services	Reasons			
	1	2	3	Other
Passenger				
Freight				
Special cargo				
Forwarding				

9. Bilateral Road Transport Agreements[41]. Use the definitions below to fill in the scope column: a. Passenger b. Freight c. Special cargo d. Forwarding

Name of the agreement	Signatory	Is it operational?	Scope				Coverage[42] (briefly describe)
			a	b	c	d	
Botswana-Zambia	Governments of Botswana and Zambia	No					Still in draft stage
Botswana - Zimbabwe	Governments of Botswana and Zimbabwe	No					Still at draft stage

10. Please fill in the following information referring to clauses in operational bilateral agreements:
   a) Tariff
      a.a Do agreements set out tariff clauses? Y: yes N: no
      a.b. If yes, is approval by members required? Y: yes, N: no

   b) Capacity
      b.a. Do agreements set out capacity limit (vehicles size, weight, or the number of passengers)? Please specify the limit.
      b.b. If yes, is the limitation temporary basis or permanent? T: temporary. P: permanent

   c) Quota
      c.a Do agreements limit the number of buses or trucks? Please specify the quota.
      c.b If yes, is the limitation temporary basis or permanent? T: temporary. P: permanent

   d) Route
      d.a Do agreements specify transport routes? Y: yes N: no
      d.b If yes, is the limitation temporary basis or permanent? T: temporary. P: permanent

	Tariff		Capacity		Quota		Route specification	
	a.a.	a.b.	b.a.	b.b.	c.a	c.b.	d.a.	d.b.

(Note: If possible, please provide the text of bilateral agreements.)

Ownership

1. Is private ownership in the provision of services through commercial establishment allowed?

Services	Existing operators	Maximum private equity permitted (%)	New entrants	Maximum private equity permitted (%)

[41] Botswana's existing road services agreements are only with the member states of the Southern African Customs Union (SACU). The country does not have any existing bilateral agreements. Two draft agreements with both Zambia and Zimbabwe are under review.

[42] For example, an agreement allows buses and trucks of two member states of the agreement carry freights or passengers on a defined route between such members states or in transit across the territory of another member state en rout to a third member state or non-member state.

Passenger	☐No✓Yes	100	☐No✓Yes	100
Freight	☐No✓Yes	100	☐No✓Yes	100
Special cargo	☐No✓Yes	100	☐No✓Yes	100
Forwarding	☐No✓Yes	100	☐No✓Yes	100
Cabotage	☐No☐Yes	100	☐No☐Yes	100

12. Is foreign ownership in the provision of services through commercial establishment allowed?

Services	Foreign ownership participation	Equity participation (%)	New entrants	Maximum foreign equity permitted (%)
Passenger	☐No✓Yes	100	☐No✓Yes	100
Freight	☐No✓Yes	100	☐No✓Yes	100
Special cargo	☐No✓Yes	100	☐No✓Yes	100
Forwarding	☐No✓Yes	100	☐No✓Yes	100
Cabotage	No✓Yes	100	No✓Yes	100

13. If the government holds equity stakes in road transport business company, are there any statutory or other legal limits to the number or proportion shares that can be acquired by foreign investors in those companies? And are there any legal constraints to the sale of the equity held by the government in those companies?

Government does not hold equity stakes in the road transport business. The government's ownership of vehicles is restricted only to vehicles that are used in the state's business, which means they are 100 % publicly owned. The Central Transport Organization (CTO) is the organization charged with the running, repair and maintenance of the government fleet.

Services	Government equity participation	Equity participation (%)	Foreign equity participation	Equity permitted (%)	Legal constraints
Passenger	✓No☐Yes	N/A	✓No☐Yes	N/A	☐No☐Yes
Freight	✓No☐Yes	N/A	✓No☐Yes	N/A	☐No☐Yes
Special cargo	✓No☐Yes	N/A	✓No☐Yes	N/A	☐No☐Yes
Forwarding	✓No☐Yes	N/A	✓No☐Yes	N/A	☐No☐Yes
Cabotage	✓No☐Yes	N/A	✓No☐Yes	N/A	☐No☐Yes

Market Structure

14. Please list below the characteristics of all commercially-established carriers operating on domestic and international routes.

14. 1 Passenger services

Name	Year carrier first offered services	Designated to provide international road transport services	Market share National	Market share International[43]	Is the firm federal, state or provincial?	Owners of capital and their respective shares (domestic/foreign)
View The World Tours	-	✓No ☐ Yes	Unknown	0	National	100% domestic
Seabelo Express	-	✓No ☐ Yes	Unknown	0	National	100% domestic
Naswi-Sech	-	✓ No ☐ Yes	Unknown	0	National	100 % Domestic

[43] Percentage of international passengers transported to/from the country

T.J. Motlogelwa Express	-	✓ No ☐ Yes	Unknown	0	National	100% domestic
Inter-Cape Tours	-	☐ No ✓Yes	Unknown	100 (South Africa-Botswana route	National	100% South African
JNG Express	-	✓No ☐ Yes			Provincial	

14.2 Freight services

Name	Year carrier first offered services	Designated to provide international road transport services	Market share		Is the firm federal, state or provincial?	Owners of capital and their respective shares (domestic/foreign)
			National	International[44]		
Uni-Trans	-	☐ No ✓Yes	Unknown		100% private	100% domestic
Lob-Trans	-	☐ No ✓Yes	Unknown		100% private	100% domestic
Lob-Road Services	-	☐ No ✓Yes	Unknown		100% private	100% domestic
Daper Plant Hire	-	☐ No ✓ Yes	Unknown		100% private	100% domestic

15. Are small-scale operators[45] allowed in the road freight transport services market?

Name	Year carrier first offered services	Designated to provide international services	Market share		Is the firm federal, state or provincial?
			National	International	
Asia/Africa	-	☐ No ✓ Yes	Unknown	Unknown	Private
Hilary Construction	-	☐ No ✓ Yes	Unknown	Unknown	Private
Vegepak Botswana	-	☐ No ✓ Yes	Unknown	Unknown	Private
Marico Transport and	-	☐ No ✓Yes	Unknown	Unknown	Private

16. Do operators in road transport participate in cooperative agreements (or cartels)? If yes, does the agreement (or cartel) set tariff for either domestic or international transport?

Services	Participation in Cooperative agreements	Name of the agreements	Tariff setting	
			Domestic	International
Passenger	✓ No ☐ Yes	N/A	✓No ☐ Yes	☐ No ☐ Yes
Freight	✓ No ☐ Yes	N/A	✓ No ☐ Yes	☐ No ☐ Yes
Special cargo	✓ No ☐ Yes	N/A	✓No ☐ Yes	☐ No ☐ Yes
Forwarding	✓ No ☐ Yes	N/A	✓No ☐ Yes	☐ No ☐ Yes

[44] Percentage of international freight transported to/from the country
[45] Entrepreneurs operating between one to five trucks.

Cabotage	✓ No ☐ Yes	N/A	✓No ☐ Yes	☐ No ☐ Yes

17. Please indicate the total number of foreign operators providing the following services across borders:

Services	Scheduled services	Non-scheduled services
Passenger	2	Unknown
Freight		
Special cargo		

18. Please list the characteristics of the 6 most important commercially-established operators for the following services:

Name of firm	Year of service commencement	Market share	Owners of capital (public or private, domestic or foreign) and their respective shares (domestic/foreign)
Special cargo			
Coin Botswana			
B.P			
Shell Oil			
Forwarding[46]			
DHL			100% private, with both foreign and local participation
Union Transport			100% private, with both foreign and local participation
Botswana Couriers			100% private, and 100% local ownership
T.N.T			100% private, with both foreign and local participation
Federal -Express			
Cabotage[47]Cabotage is taken to be an ad-hoc activity.			

Regulation

19. Institutional status of sector regulator	
When was the regulator established? 1974	
Is the regulator an institutionally independent agency?[48]	✓No ☐ Yes
How is the sector regulator financed?	
License and other fees 0 (%)	

[46] It is claimed that there could be well-over thirty companies some of which might be unregistered.
[47] The understanding in Botswana of "cabotage" is that these are goods that are either brought in for special purposes (such as earthmoving machinery that is unavailable locally) and will return to country of origin when the contract is over.
[48] "Institutionally independent" means that the regulator is not part of the ministry and is not linked to the operating entity (national airlines/airports).

State budget 100 (%)	100% State budget
Other ______100 (%)	
How many technical and economic professionals are employed?	913

20. What are the main requirements that an operator must fulfill in order to become an international operator and have the right to be designated in bilateral agreements?

	Requirements
Passenger	Cross border permit, passenger lists, valid drivers licenses, roadworthiness certificate
Freight	Cross border permits, weighing certificates, drivers licenses, roadworthiness certificates
Special Cargo	Special permit, cross border permit
Forwarding	

21. Price regulation:

a) Does the government or regulatory agency regulate tariffs?

b) If yes to a), is fare discounting allowed?

c) If no to a), how is abuse of monopoly power (cartel) and/or predatory pricing dealt with? Government

d) Does the government or regulatory agency provide pricing guidelines to road transport companies?

e) Are professional bodies or representative of trade and commercial interests involved in specifying or enforcing pricing guidelines or regulations?

Domestic services	a)	b)	c) Explain	d)	e)
Passenger	☐ No✓Yes	✓ No ☐ Yes		☐ No✓Yes	☐ No✓Yes
Freight	✓ No☐ Yes	☐ No☐ Yes	An entirely self regulating market	☐ No ☐ Yes	☐ No✓Yes
Special cargo	✓ No☐ Yes	☐ No ☐ Yes	This is also entirely self regulating	✓ No☐ Yes	☐ No✓Yes
Forwarding	✓ No☐ Yes	☐ No ? Yes		✓No☐ Yes	✓No☐ Yes
Cabotage	✓ No☐ Yes	☐ No☐ Yes		☐ No☐ Yes	☐ No☐ Yes
International services	a)	b)	c) Explain	d)	e)
Passenger	✓ No☐ Yes	☐ No☐ Yes		✓ NO☐ Yes	✓No☐ Yes
Freight	✓ No☐ Yes	☐ No ☐ Yes	It is entirely self regulating, where prices reflect market trends	✓ No☐ Yes	✓ No☐ Yes
Special cargo	✓No☐ Yes	☐ No☐ Yes		No☐ Yes	No ☐ Yes
Forwarding	✓No☐ Yes	☐ No☐ Yes		☐ No☐ Yes	☐ No☐ Yes

22. Regulation on entry of new business

22. 1 Licenses

a) Are license requirements limited to certain operators in the road freight transport?

☐ public for-hire ☐ private own-account

☐ License exemptions for government operators

☐ License exemptions for agriculture trucks

b) If the number of operators is not restricted by policy, is it necessary to obtain a license (or concession) to operate in the public road transport market? Who is responsible for issuing the license?

Services	Domestic services		International services	
	License/ Concession[49]	Body	License/ Concession	Body
Passenger	☐ No✓ Yes	DRTS	☐ No✓ Yes	DRTS
Freight	☐ No✓Yes	DRTS	☐ No✓ Yes	DRTS
Special cargo	☐ No✓Yes	DRTS	☐ No✓ Yes	DRTS
Forwarding	☐ No✓ Yes	DRTS	☐ No✓ Yes	DRTS
Cabotage	☐ No✓ Yes	DRTS, with clients' department/ministry/company corroboration	☐ No✓ Yes	DRTS with client's approval

c) Does the license specify restriction on operating routes and number of haulage units? Please use the following term to fill the "route" and "Unit" columns.
Y: yes
N: no

Services	Domestic services				International services			
	Route	If yes, please specify the reserved routes.	Unit	If yes, please specify the haulage unites restricted.	Route	If yes, please specify the reserved routes.	Unit	If yes, please specify the haulage unites restricted.
Passenger	Y	1			Y	Bilaterally agreed to	Kilometers	
Freight	N	-			N			
Special cargo	N	-			N			
Forwarding	N	-			N			
Cabotage	N	-			N			

d) Is the license required by domestic or foreign operators or both? Are foreign operators subject to different additional licensing conditions from domestic operators. Is there quota for foreign operators?
Please use the following term for the "required by" column.
D: domestic operators
F: foreign operators
B: Both

	Domestic			International		
Services	Required by?	Additional conditions for foreign operators	Quota for foreign operators?	Required by?	Additional conditions for foreign operators	Quota for foreign operators?
Passenger	B		✓No☐ Yes		None noted	✓No☐ Yes
Freight	B	None noted	✓No☐ Yes		None noted	✓ No☐ Yes
Special cargo	B		✓No☐ Yes		None noted	✓No☐ Yes
Forwarding	B		✓No☐ Yes			✓No☐ Yes

49 Please indicate by circling which one is required.

Cabotage	B	Corroboration from the user ministry/department, registered company etc	✓ No☐ Yes		None noted	☐ No☐ Yes

e) Is the license issuance subject to fee? Does a differential fee rate apply to foreign operators? Is there quota for foreign operators?

Services	Domestic		International	
	Fee payment (Please specify the amount in local currency)	Differential fee rate between domestic and foreign operators	Fee payment (Please specify the amount in local currency)	Differential fee rate between domestic and foreign operators
Passenger	P 40. 00	☐ No✓Yes	P 100 (Mini buses, P 160 (Buses), p 75 (Taxi Cabs)	☐ No✓Yes
Freight	Depends on weight	✓No☐ Yes	Depends on weight	☐ No✓Yes
Special cargo	Depends on weight	✓No☐ Yes	Depends on weight and cargo types	☐ No✓Yes
Forwarding	Depends on weight	✓No☐ Yes	Depends on weight	☐ No✓ Yes
Cabotage	Depends on weight	☐ No☐ Yes	Depends on weight	☐ No✓Yes

f) Please specify the main conditions to obtain the license that new entrants must fulfill. Please use the following.

1 --- Financial fitness
2 --- technical fitness
3 --- public safety requirements
4 --- other conditions

Services	Conditions	
	Domestic services	International services
Passenger	1,3	1,3
Freight	1,2,3	1,3
Special cargo	1,2,3	1,23
Forwarding	1,2,3	1,2,3
Cabotage	1,2,3	1,2,3

g) If the number of providers is limited by policy, through what mechanism are licenses or concessions allocated? How many licenses are allocated?

There are no policy limitations on either of the stated services mentioned below.

Service	Mechanism					Number of licenses
	Competitive tender	First come, first served	Public hearings	Opinion of incumbents	Other (describe in brief)	
Passenger						
Freight						
Special cargo						
Forwarding						
Cabotage						

h) Does the incumbent benefit from preferential treatment?

Services	Right to object to future increases in installed capacity	Favorable treatment when increasing the number of vehicles
Passenger	✓No☐ Yes	No ✓ Yes
Freight	✓ No☐ Yes	☐ No✓ Yes
Special cargo	✓ No☐ Yes	☐ No✓ Yes
Forwarding	✓ No☐ Yes	☐ No✓Yes
Cabotage	✓ No☐ Yes	☐ No✓Yes

i) What is the average time to obtain the license and registration, if registration is required? Is this a different time for domestic operators and foreign operators?

Service	Domestic operators		Foreign operators	
	License	Registration	License	Registration
Passenger	3-4 months	1-Day	3-4 months	1-Day
Freight	1-Day	1-Day	1-Day	1-Day
Special cargo	1-Day	1-Day	1-Day	1-Day
Forwarding				
Cabotage				

22.2 Do the above entry regulations apply to a small-scale operator? ☐ No ? Yes

23.3 Is company affiliation for a license holder compulsory?

Passenger ? No ☐ Yes

Freight ? No ☐ Yes

23. Regulations on vehicle: Is there any regulation on the following items of a) dimension and weight; b) technical vehicle safety; c) driving hours; and d) fleet purchase?

Services	Dimension and weight	Inspection system to monitor vehicle safety	Driving hours	Fleet purchase restrictions
Passenger	Yes	Yes	Yes	No
Freight	Yes	Yes	Yes	No
Special cargo	Yes	Yes	Yes	No

24. Regulations only applicable to passenger and freight transport servi ces. Please fill if there are any regulations on the following items.

Restrictions on bus schedules able to be operated ✓No ☐ Yes

Restriction on bus stations able to be operated ✓ No ☐ Yes

Restrictions on freight loading and unloading at specified freight centers ✓ No ☐ Yes

25. Discrimination between foreign companies and domestic ones.

a) Do foreign operators have the same right to operate in the domestic market as domestic firms?
☐ No ? Yes If no, what are the difference?

Cabotage is strictly limited to need (approval by the director) with proof of contract

b) Does the government provide subsidies to domestic road transport companies? If yes, foreign operators are the beneficiary of the subsidies?

Services	Subsidy provision	Is a foreign operator the beneficiary of the subsidy?
Passenger	☐ No ✓Yes	✓ No ☐ Yes Such would be available if those operate to the areas that are subsidized
Freight	✓ No ☐ Yes	✓No ☐ Yes
Special cargo	✓No ☐ Yes	✓ No ☐ Yes
Forwarding	✓ No ☐ Yes	✓No ☐ Yes
Cabotage	✓No ☐ Yes	✓No ☐ Yes

26. Public consultation and transparency

a) Which of the following are consulted in advance of regulatory decisions?

✓ Service providers
✓ Consumer groups (Through Government Gazette)
☐ User industries
☐ Other: ____________________

b) How are laws and regulatory decisions made public?

☐ Published on the regulator's website
✓Published in an official gazette
☐ Other: ____________________

Universal Service

27. How does the government define universal service (or universal access)?

This is defined in terms of creating a road network that reaches most of the country.

28. Does the government oblige large domestic transport companies to provide universal service?

Passenger ✓No ☐ Yes
Freight ✓ No ☐ Yes

29. Do foreign companies have an access to universal services?

Passenger ☐ No ✓Yes
Freight ☐ No ✓ Yes

30. Do foreign companies have social obligations without adequate compensation?

☐ No ✓ Yes

Past and Future Changes in Policy

31. Please indicate major changes in market access policies, ownership rules, and regulation since 1985. (e.g., domestic liberalization, implementation of open skies agreements, joining of regional agreements on air transport, privatization of state-owned airlines and airport facilities etc)

Area of policy change (market access, ownership or regulation)	Year of change	Description of change
Ownership	Overdue (meant for NDP 8)	Privatization of some functions of the Central Transport Organization such as the repair and maintenance of the government fleet
Regulation	2002	All public carriers will be required to have a carrying capacity of more 25 or more people. This exercise is meant to phase out the use of 16 seaters for both safety reasons and environmental protection.
Regulation	NDP 8	Computerization of the Vehicle Registration and Licensing System (VRL) Capturing all vehicles in the country on a centralized national computer database. Cars were also registered not according to region as before. The registration system is now national in approach, where such registration is similar irrespective of district/town of car owner.

Ownership	1998	The introduction of metered taxi services and call cab operations.
Regulatory	Due in NDP 9 ???	Legislative means to reduce drunken driving. To allow for only 50mg/100 ml of blood as the maximum permissible limit, zero rate allowance of drinking for public transport passenger drivers and freight drivers, making it lawful for police officers to demand for breath test when there is any suspicious driving

32. Please indicate announced or anticipated changes in the same areas.

Area of policy change (market access, ownership or regulation)	Anticipated date	Description of change

33. Which of the following government programs are available to road transport companies? Are the available programs applied to foreign road transport companies?

Please use the following term for the "type of services" column.

P: Passenger services

F: Freight services

S: Special cargo

F: Forwarding

C: Cabotage

Program	Type of services	Available to foreign construction companies established locally?
☐ Direct tax payments	☐ P ☐F ☐S ☐F ☐C	✓ No ☐ Yes
☐ Tax exemptions		
☐Income	? P ☐F ☐S ☐F ☐C	✓ No ☐ Yes
☐ VAT	? P ? F ☐S ☐F ☐C	✓ No ☐ Yes
☐Ownership	? P ☐F ☐S ☐F ☐C	✓No ☐ Yes
☐ Preferential access to credit	☐ P ☐F ☐S ☐F ☐C	✓ No ☐ Yes
☐ Below-market interest rates	☐ P ☐F ☐S ☐F ☐C	✓ No ☐ Yes
☐ Export financing	☐ P ☐F ☐S ☐F ☐C	✓No ☐ Yes
☐ Government-provided risk insurance (including inflation protection programs)	☐ P ☐F ☐S ☐F ☐C	✓No ☐ Yes
☐ Underwriting of feasibility studies	☐ P ☐F ☐S ☐F ☐C	✓No ☐ Yes
☐ Other: ________________	☐ P ☐F ☐S ☐F ☐C	☐ No ☐ Yes

Regional Integration Agreements in Road Transport Services

34. Please indicate if there are any preferential arrangements affecting road transport services, and list the preferential measures.

Name of agreement	Partner country(s) in agreement	Date of entry into force	Preferential measures
Memorandum of Agreement (MOU	South Africa, Lesotho, Swaziland, Namibia		Ensuring an equitable distribution of cross border traffic to achieve parity amongst the signatories who are also member states of the Southern African Customs Union (SACU)

Bilateral road transport services	Zambia)	Under review	Details unavailable
Bilateral road transport services	Zimbabwe	Under review	Details unavailable

Employment

35. Main indicators (for the years 1990-2000).

How many people are employed by the main national road transport companies? FY (1995) = 1823, FY (2000)= (4225)
What share of workers is employed by foreign-owned operators providing road transport services? FY(1995)=31% , FY (2000) =
How many people are directly employed in the provision of road transport services? Total 2382 Passenger Figures not dis-aggregated Freight Figures not dis-aggregated
What share of the total labor force is directly employed in the provision of road transport services? Total road transport FY (2000)= 4942 Passenger FY (2000)= 1031 Freight FY (2000)=1601
What is the annual average wage in this sector? P1,264.00 (1995); P2,827.00 (2000)

If available, please attach time series data on these employment indicators them separately. If time-series data from 1990 to 2000 is not available, please collect indicators for the years 1990, 1995 and 2000.

Investment

(Figures are not available)

36. Investment indicators (for the years 1990-2000)

Service	Total amount of investment	Total amount of foreign direct investment	Total stock of foreign direct investment
Passenger			
Freight			
Special cargo			
Forwarding			
Cabotage			
Others			

If time-series data from 1990 to 2000 is not available, please collect indicators for the years 1990, 1995 and 2000.

Prices

37. Please fill in the table below. If possible distinguish between season and off-season road transport prices. For a comprehensive assessment of road transport performance, it would be extremely useful to have historical data on prices and/or price indices for the various services. If time series data are available, please attach them separately (preferably electronically).

Service	Price (in local currency)	Date	Comments
Roundtrip standard bus fare between the two most important domestic cities	P 35.00	2002	This the fare for Francistown-Gaborone

Roundtrip standard bus fare to San Salvador (or relevant neighboring country)	P 70.00	2002	Gaborone-Johannesburg
Freight rate between the two most important domestic cities	Differs by company P 45 P/KG and P 5 per every other KG	2002	
Freight rate to San Salvador (or relevant neighboring country)	P135	2002	Gaborone-Johannesburg
Forwarding, excluding drayage, rate (unit rate)	Differs by company.		
Rate for drayage services (average market price)	Though differs by company	2002	

38. Is the freight rate fixed? ? No ☐ Yes If yes, what is the fixed unit rate? __________
If not, how does it vary by the type of freight?

Type of freight	Unit price	Date	Comment

39. How is the passenger rate determined?

Quality and Access to Services

40. Please fill in the following indicators of quality and access to services.

Indicator	Value	Date	Comments
Share of exports/import carried by road[50]			
Number of passengers carried on domestic routes by:			
*national operator (Local operators)[51]	D		This type of data is not captured by the C.S.O. Please refer to attached Transport and Communications booklet provided for other indicators.
*foreign operators	Data not captured		This type of data is not captured by the C.S.O. Please refer to attached Transport and Communications booklet provided for other indicators
Number of passengers carried on international routes by:			
*national operators[52]			This type of data is not captured by the C.S.O. Please refer to attached Transport and Communications booklet provided for other indicators.

[50] This data is unavailable. Data is kept only for both the rail and air transport services. These will be available in the attachments provided.
[51] This data is unavailable. Data is kept only for both the rail and air transport services. These will be available in the attachments provided.
[52] This data is unavailable. Data is kept only for both the rail and air transport services. These will be available in the attachments provided.

*foreign operators	There are multitudes of small operators doing this route some of which might not be registered.		This type of data is not captured by the C.S.O. Please refer to attached Transport and Communications booklet provided for other indicators
Freight carried on domestic routes by[53]:			
*national operators	As above	As above	As above
*foreign operators			As above
Freight carried on international routes by:			
*national operators			
*foreign operators			
Average amount of time to cross border:			
*Passenger	30 minutes		This figure is applicable to the “normal” season which excludes some religious holidays.
*Freight			
Percentage of on-time arrival or delivery by road:			
*Passenger			
*Freight			
Documentational requirements to cross the border: Please elaborate.			
*Passenger	National Passports for countries in the SACU region and some commonwealth countries. Visas required for the rest of the world		
*Freight	Customs clearance certificates, national weigh-bridge certificates		

Innovations

41. Do road transport companies adopt the following technological innovations?

Innovations	If yes, how many companies adopt it, out of ten major ones?	
	Passenger (Bus)	Freight (Truck)
☐ Technological vehicle-related innovations (e.g. new trucks with electronic combustion systems and double-stack technology)).	1	N/A
☐ Adoption of the Global Positioning Services (GPS) system	N/A	N/A
☐ On-line computer reservation systems	N/A	N/A
☐ Computer controlled management system		
☐ Automated passenger counts and traffic survey	N/A	N/A
☐ Establishment of information network	N/A	N/A

[53] This type of data is not recorded by the Central Statistics Office

Appendix D: List of People Interviewed

Dr. Ravindran
Department of Civil Aviation
(267) 3655213
(267) 303348
pravindran@gov.bw

Lawrence Wright
Air Botswana
(267) 352812
(267) 374802
Lwright@airbotswana.co.bw

Ishamel Dipholo
Air Botswana
(267) 352812
(267) 374802
Idipholo@airbotswana.co.bw

Mr. Thaganeng Koloi
Department of Road Transport and Safety
Ministry of Works, Transport and Communications
Telephone: (09267) 305422
Fax Number: (09267) 300930
Tkoloi@gov.bw

L. Mpofu
Department of Road Transport and Safety
Ministry of Works, Transport and Communications
Telephone: (09267) 305422
Fax Number: (09267) 300930

Ms. G Mosupi
Transport Statistics Unit
Ministry of Works, Transport and Communications
Private Bag 0024
Gaborone
Phone Number: (9267) 352200
Fax number (9267) 352201
E-mail: gmosupi@gov.bw