



Government of Botswana



European Union

PRIVATE SECTOR DEVELOPMENT PROGRAMME BOTSWANA

***Developing a Strategic Plan and Implementation
Program for Botswana National Beef Producers
Union***

BWP/1623/RO1/GO

SITUATIONAL ASSESSMENT REPORT

PREPARED BY



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GLOSSARY ABBREVIATIONS AND ACRONYMS

Term	Description
BB	Business Botswana
BAITS	Botswana Animal Information and Traceability System
BEDIA	Botswana Export Development and Investment Authority
BVI	Botswana Vaccine Institute
BNBPU	Botswana National Beef Producers Union
BUAN	Botswana University of Agriculture and Natural Resources
CDE	Center for the Development of Enterprise
DVS	Department Of Veterinary Services
EU	European Union
GoB	Government of Botswana
LITS	Livestock Identification Tracing System
MITI	Ministry of Investment, Trade and Industry
PSDS	Private Sector Development Strategy
PSDP	Private Sector Development Programme
TOR	Terms of Reference

1. BACKGROUND

The BNBPU was under the Societies Act in 2013. It serves as a national coordinating and advocacy body for the cattle producers in Botswana.

The primary mandate of the BNBPU is to organise the cattle farming community to address cohesively the issues that affect their production conditions, the market and livestock improvement. The ultimate goal is to enhance investment returns.

The BNBPU undertook study tours designed to provide a greater understanding of market requirements and compliance thereto. Amongst the significant findings stemming from the study tours are the following:

- (i) The beef sector is part of the economic diversification programme
- (ii) The need for advocacy on behalf of the cattle farmers in the country
- (iii) The need for the increased role of the private sector in the activities of the beef industry, such as active participation in the Botswana Animal Information and Traceability System (BAITS)
- (iv) Department of Veterinary Services to ideally take a more regulatory role.

Rationale for Development of Strategy for BNBPU

It has been observed that less than 5% of national throughput comes from commercial farming entities. There is no evidence that this figure has changed since 1966, yet cost of production has risen. To address inter alia, the general growth of the beef industry BNBPU was thus formed in order that it gives impetus to programs and projects that may be undertaken to organise the cattle farming community into a coherent, well-coordinated commercially oriented community of cattle producers.

2. INTRODUCTION

2.1. Purpose of the Situational Analysis Report

The purpose of the Situational Analysis Report is to provide the foundation upon which the Strategy for the BNBPU is developed on the basis of reflecting the current realities of BNBPU's organizational set up and how BNBPU operates within the current realities of the beef industry in Botswana. Consequently the Situational Analysis Report seeks to do the following:

- (i) Provides the overall premises for the relevance of having a Beef Union Strategy and identify appropriate strategic interventions for a fully functional BNBPU that can provide effective services to its members whilst ensuring its contribution to the sustained growth of the Botswana beef industry.
- (ii) Articulate inter alia lessons, views, needs and perceptions and expectations of the BNBPU's members and stakeholders as primarily ascertained through the consultations undertaken during the process of developing the strategy. It also provides an understanding of what has already been done in regard to the BNBPU.
- (iii) In immediate relation to the above, it maps out the perceptions and experiences of key stakeholders in relation to the BNBPU situation.

- (iv) Identifies actors and organisations that already active in the beef industry and their potential as strategic partners and or alliances
- (v) Provide for the key elements of the BNBPU Strategy including on the scope; goal; mission; vision; capacities, and, mission.
- (vi) Establishes elements of a roadmap for self-improvement that will strengthen BNBPU and help ensure that the organisation achieves its goals.
- (vii) Provides comparative analysis and lessons learnt from selected countries on the institutional organisational functionality of entities similar to BNBPU

2.2. Defining Strategy Development

Strategy development is a process that involves assessment and analysis of different environments before formulating a strategy. The situational assessment also known as a “current reality assessment” looks to reveal the state of the internal environment of an organisation.

It is intended to capture the current different views from the stakeholders of the organisation. The interviews with the stakeholders reveal the weaknesses and strengths of the organisation. They cover both internal and external stakeholders.

The “Current Reality” covers both internal and external factors to determine the “as-is” environment. It is the departure point for charting the desired strategic direction for the organisation. The BNBPU Current Reality was analysed through the following 5 perspectives:

- Distinctive Competencies;
- Value Proposition;
- Internal Structures;
- Major Current Concerns; and
- Stakeholder Emerging Requirements

This document captures the responses from the sampled key stakeholders. BNBPU crafted the stakeholder list to cover a variety of views of stakeholders from different perspectives to acquire a broad picture of the organisation.

In addition, the document is informed by key studies done in Botswana on the beef value chain and the identification of actual and potential roles and responsibilities of different actors involved in the beef industry. The role identification assists in ascertaining what the vision, mission, mandate, organisational functional capacities and human resources of the BNBPU should entail. This is an important factor given that the BNBPU does not operate in isolation but within the beef industry in its entirety.

Lessons from Australia, Norway and Namibia were used to provide informed lessons from existing functional organisations of a similar nature.

3. STRATEGY DEVELOPMENT PROCESS

The current stage of the project has been highlighted **RED** in the diagram below:

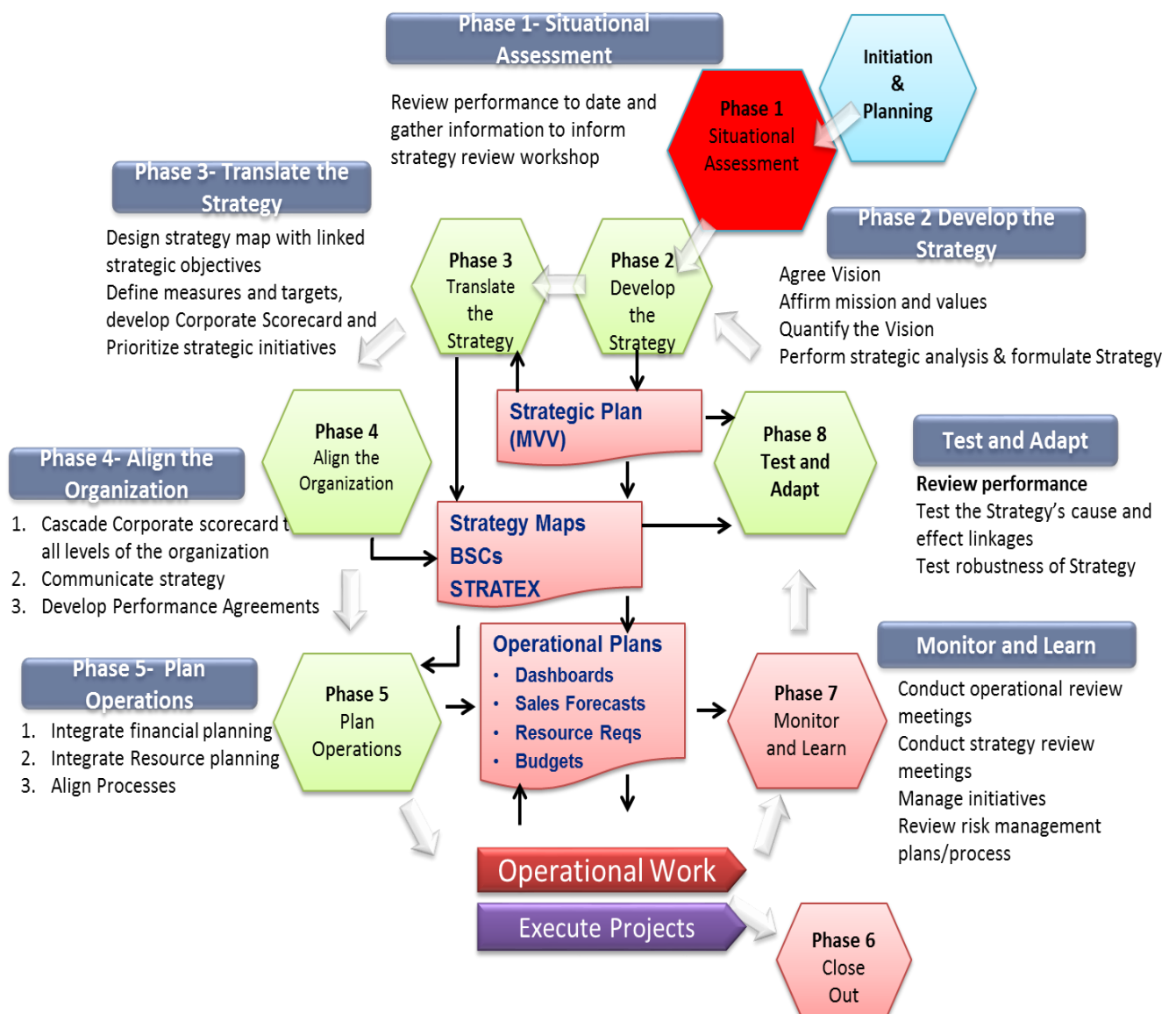


Figure 1: Kaplan and Norton Premium Execution Process

4. CURRENT REALITY ASSESSMENT

The situational analysis is a summary of BNBPU's status and reported challenges and possible areas of strengthening through strategic interventions. A number of documents were reviewed to inter alia, provide an understanding of the beef industry within Botswana, regionally and internationally to identify organisational structural roles, responsibilities, functions, mandates, vision and key messages for informing the development of the strategy and implementation plan. Furthermore, this section is informed by the interviews undertaken with selected stakeholders.

Specific to the BNBPU as an entity established under law to represent its membership the assessment examined the following areas that are generally regarded as being basic to the success of a representative non-profit organisation:

- Commitment – this refers to any evidence of the ability, readiness and desire to develop activities and modalities that allow for the generation of revenue for the financial self-sufficiency of BNBPU. For adequacy of commitment there is a need for the ability to be dynamic and change outlook. Presently, BNBPU has indicated that it desires to acquire financial contributions from its members through transaction levies and to expand and broaden its membership. This preliminary attributes signifies that BNBPU has some reasonable level of commitment and requires therefore that the Strategy addresses operational modalities at institutional governance levels that could assist the organisation to drive policy and regulatory changes which will ensure reliable financial contributions and to have in place financial management systems inclusive of these on accountability and audits. Additionally, there is need for the Strategy to address other diversified fund-raising and resource mobilization measures.
- Institutional and organisational governance – the premise for effective institutional governance requires that an entity should have a structure that permits for activities to be effected on a day to day or regular basis with structures for accountability and oversight. The activities are often guided by the overall mission of the organisation: the mission and vision statements should be clear and articulated to all and understood by all members. In relation to BNBPU's mission, there is need for the Strategy to develop and elaborate on the Mission of the BNBPU. This can be gleaned from its Constitution that reflects the reasons for the establishment of the BNBPU under the Societies Act. A mission statement will help guide the direction and provide focus for BNBPU to achieve its objectives. In relation to accountability and oversight, the BNBPU has within its Constitution an Executive Committee. However, the effectiveness of the Executive Committee is generally regarded as being hindered by the lack of a Secretariat which is supposed to provide technical support for the work of BNBPU Executive Committee. Additionally, lack of financial resources is also seen as a crucial factor in the effectiveness of the Board. The result of this lack of effectiveness is among other factors a reason that BNBPU is unable to meet the needs of its membership. The Strategy will therefore need to address the role of the Executive Committee in overseeing the management and direction of BNBPU, procedures and processes for electing the Committee, and, also provide for the requisite capacities within the Committee Members to successfully reach its vision and mission in the short, medium and long term. In addition to the Executive Committee there is need for an arm of the BNBPU to run the day to day activities of the organisation and ensure that the overall policy direction is followed. Currently the BNBPU has no Secretariat. This will be addressed in the Strategy including the functions, roles, positions and responsibilities of senior, middle, junior and other management capacities. At institutional governance level, there is need for clarity on the

roles and responsibilities and to have all these reflected in an organisational structure or organogram.

- *Membership and Processes of Participation* – this addresses how membership is acquired, the roles and responsibilities of the members and the processes in which they are enabled to interact in a mutually beneficial manner with BNBPU. The current reality is that membership is open to all cattle farmers, both smallholder and commercial farmers. One of the challenges BNBPU has in respect of membership is recruiting and signing up new members due to amongst others the lack of institutional facilities for networking across the country. This requires that the strategy address the areas of access to information, audits, and modalities for transparent participation, and forums in which all members as well as the public can interact and interface with BNBPU.
- *Administration and Finances* – as already articulated above, the current reality of BNBPU is that there is no operational arm in the form of a secretariat responsible for its administration and finance that are necessary in operationalising activities that meet its mission or vision. The Strategy will address the nature, form, functions and capacities of the Secretariat. It will further address strategic and operational planning, financial planning, budgeting, cash flow and legal compliance.
- *Human Resources* – Following the definition of its mission, vision, goals and strategic direction the BNBPU will outline the capacities required at oversight, day to day managerial and administrative and networks levels in its strategy. This will include an elaborated organisational chart that spells out the positions and jobs, functions and reporting structures. The current reality is that the BNBPU has no existing structures with associated human resources. It is expected that the Strategy will address human resources planning that covers, employee rights, safety and occupational health, staff development and other pertinent areas addressing human resources development.
- *Strategic Alliances* – Strategic alliances are necessary for knowledge management, advocacy, lobbying and leveraging of resources. Currently there are institutions on the ground that can provide strategic alliances for BNBPU. These include the Department of Veterinary Services; Botswana University of Agriculture and Natural Resources, and, the Botswana Meat Commission.
- *Impact* - An important aspect of the BNBPU is its function as an advocacy and lobbying entity for the rights of its members, participation in the beef industry and having a credible voice and stature. This means that the Strategy has to address the methods, modalities and processes for meaningful impact of the activities of BNBPU in accordance and in coherence with its vision, mission, strategic plan and any annual workplans. The Strategy will further address how BNBPU can monitor and evaluate the effectiveness of its programs and activities through the development of monitoring and evaluation framework and associated means of developing indicators.
- *Roadmap* – Based on the current realities of the BNBPU situation a roadmap is reflected in the BNBPU Strategy.

4.1. Policy Context

The Policy Context is designed to provide an understanding on the overall national framework in which the BNPBU is currently situated and associated key elements that must be addressed by the Strategy. This section focuses on the policy framework as opposed to the immediate above that addresses BNPBU as an entity. The Table below provides for the reviewed documents and key messages for strategy development derived therefrom.

<u>Document</u>	<u>Key Messages</u>	<u>Possible Role of the BNBPU</u>
<p>1. BEDIA Beef Sector Essentials for FDI, 2007</p> <p><i>This document seeks to promote investment into the agricultural livestock industry in Botswana.</i></p>	<p>Preferential market access to EU markets at duty rate of 5% or less</p>	<p>Expansion of market access advocacy roles: direct participation in areas including trade and market access, consumer marketing, research and development, animal health and welfare, and economics and infrastructure planning (for amongst others meeting EU and other market requirements and standards)</p> <p>Structurally the Secretariat must have the capacity to source data, information and knowledge as well as the capacity to coordinate.</p>
	<p>Investment facilitation structures at national levels</p>	<p>Coordination and linkages with outside markets</p> <p>Structurally the Secretariat must have a unit that coordinates, markets etc</p>
<p>2. DVS List of Abattoirs</p> <p><i>Provides a list of registered abattoirs in Botswana</i></p>	<p>There is a highly significant number of abattoirs across the country</p>	<p>Intense participation in the beef industry beyond supply of cattle requires capacities and abilities to self-monitor in regard to adherence to requisite standards. BNBPU can play a role in enforcing and monitoring of acceptable levels of food safety and hygiene in and around abattoirs</p>
<p>3. Botswana Beef Value Chain Study: Financial Analysis of selected Enterprises and Pricing Mechanisms, Keyser J.C. 2012</p> <p><i>The working paper was prepared as input to the Botswana Beef Value Chain Study initiated in 2011. The primary aim of the Beef Value Chain Study is to provide actionable recommendations for improving the competitiveness of the Botswana beef sector. The financial analysis presented in the working paper aims to contribute to that objective by taking a detailed look at the underlying costs and returns to beef production at the farm, feedlot, and butchery stages of the value chain and at how profits are shared between sector participants.</i></p>	<p>Despite the importance of beef to Botswana, the country does not yet have a routine system for monitoring the costs and profitability of beef production.</p>	<p>Monitoring and dissemination of information on trends in regard to costs of doing beef cattle business to enable farmers to strategically plan their financial and other inputs as well as lobby in one voice for reduction of costs and attaining of good investment returns.</p> <p>Structurally, there must be capacity to also communicate, conduct outreach activities and sensitise farmers on trends regarding costs of doing beef cattle business.</p>

<p>4. Botswana Agri-Food Value Chain Project Beef Value Chain Study; published by the Ministry of Agriculture and the United Nation Food and Agricultural Organisation, 2012</p> <p><i>This study provides thorough assessments of the country's main agro-food subsectors in order to design policies and programs that promote competitiveness while considering economic, social and environmental sustainability issues.</i></p>	<ul style="list-style-type: none"> ▪ Botswana remains a small player in the markets of the major importing countries relative to these large global players. ▪ Competition purely on price will be difficult as the necessary economies of scale are not present. ▪ Botswana will likely have more opportunities in differentiated high-value niche markets, such as branded quality cuts for top-end retailers or restaurants, or in the fast growing or newly emerging markets of smaller beef importing countries where it can exploit its location and/or product qualities as competitive advantages. ▪ The market and trade analysis in the report indicates the importance for a beef exporting country of understanding the dynamics of the markets it is exporting to, of building up an intelligence network, and of having different strategic options that can be selected when the conditions and terms of trade change. In many countries such a task is vested in independent meat boards. Such boards do not trade in meat, but gather information, work towards improving the sector's performance, and promote the national product. Their financing is often organised through a levy system, with or without government support. 	<p>Capacity to collate, interrogate and package data, information and knowledge product for strategic positioning. Obviously the BNBPU is not expected to have all those capacities in-house. Any lack of in-house capacity can be mitigated by ensuring that there are strong linkages and robust partnerships with other entities on the ground such as BUAN, DVS, MITI and other relevant practitioners</p> <p>Establishment of supportive structure such as Meat Boards or BNBPU incorporating that role</p>
	<ul style="list-style-type: none"> ▪ The EU market remains a key target, but market diversification will be essential, given the EU and South Africa markets represent 80% of export sales. ▪ Botswana's market entry advantages are eroding and competition increases, the EU market still offers the best value/volume 	<p>Intelligence gathering capacities</p> <p>Understanding of markets</p> <p>Capacity to inform the negotiation of beef trade deals in the best interests of the farmers</p>

	<p>option, especially if Botswana can move to a higher value-added beef product. Increased diversification into new export markets will however be essential in any strategy developed for the value chain.</p> <ul style="list-style-type: none"> Three sets of export markets are highlighted: high-end non-EU markets in Europe, Halaal markets in the Middle East, and fast growing and nearby markets in Sub-Sahara Africa. Partnerships with South Africa's spreading supermarket chains and direct investment should be considered as further options in an African expansion strategy. 	
	<ul style="list-style-type: none"> The problems at the BMC, the main leverage point in Botswana's beef value chain, clearly points to the need for a complete overhaul, rather than to change at the margins. 	Advocacy, lobbying and negotiating skills and facilities to offer options on the role of BMC and other actors within the evolving beef industry which is grounded on the overall intention of Botswana being the best prime beef producer
	<ul style="list-style-type: none"> A Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis conducted as part of the study essentially indicated that while there is a long list of weaknesses and a shorter but equally serious list of threats, these weaknesses can largely be addressed in a short (five-year) time period and the threats can be mitigated to an acceptable degree. In order to realize its potential, the Botswana beef value chain stakeholders will need to come together and tackle all core weaknesses simultaneously, relentlessly, and persistently. 	<ul style="list-style-type: none"> ➤ Capacity to identify immediate, short, medium and long term strategic interventions ➤ Capacity to manage and monitor projects ➤ BNBPU needs to have good corporate governance principles that ensure the building of trust and ownership amongst its members, potential members and beef stakeholders
	<ul style="list-style-type: none"> Stakeholders in Botswana's beef value chain will have to agree on a vision on meat production and on the role beef production plays in that overall picture. 	<ul style="list-style-type: none"> ➤ There is need for a common vision with strategic interventions to meet the needs of all members

	<ul style="list-style-type: none"> ▪ A vision provides the objectives for the value-chain development strategy and should be realistic, quantified as much as possible, and inspiring to stakeholders. 	
	<ul style="list-style-type: none"> ▪ Develop a Meat Board of Botswana – reflecting another public-private partnership, but mostly driven by the private sector, such a board would provide a discussion platform and industry advocacy group and take on a number of issues essential to the competitive performance of the beef value chain such as market research and promotion, conducting performance benchmark studies, research and development, developing a national beef standard, and so on 	<ul style="list-style-type: none"> ➤ Clarification of the roles and responsibilities in the value chain: The strategy must reflect clear roles and responsibilities
	<ul style="list-style-type: none"> ▪ Strengthen farmer groups at various levels - promote the organisation of cattle owners into cattle management groups per cattle post linked to further regional and national apex organizations. These management groups could take on cooperative format that would facilitate links to program support and commercial services (e.g., finance, transport, veterinary services), economies of scale and bargaining power in input procurement and marketing, integration of smallholder farmers into the BMC shareholder structure, contract production, advocacy for smallholders (e.g., in a Meat Board), and so on. 	<ul style="list-style-type: none"> ➤ Capacitate BNBPU in promoting strong farmers association that bring meaningful membership to BNBPU whilst ensuring the farmers associations also benefit
	<ul style="list-style-type: none"> ▪ A competitive value chain is a knowledge-driven value chain, i.e., quality data are present and stakeholders have the ability to effectively use them. 	<ul style="list-style-type: none"> ➤ Capacity to participate, apply and use tools in the knowledge economy. ➤ Capacity to produce knowledge products essential for beef industry growth

4.2. Overview of Organizational Structure

The Botswana National Beef Union's Constitution spells out its objectives, source of income, membership and spells out its organizational structure as follows:

- National Council – being the supreme authority of the Union and consists of 34 members of which 2 are from each region of the country
 - According to the Constitution the feedlot and stud breeders may join as members of the National Council through their regional bodies
 - Attendance to the National Council meetings is open to farmers delegates and observers as invited by members
- The Executive Committee – responsible for implementation of policies and appears to be responsible for day-to-day functional duties. These duties are hindered by lack of a functional secretariat or operational body and lack of funds. The lack of an operational body itself may provide difficulties in sourcing finance.
- Regional Management Committees whose functions are to represent the interest of the Union in the designated regions
- Board Secretary – who has to attend all meetings and serves as a secretary for recording minutes and disseminating accordingly

It is apparent that given the direction of the key messages from the reviewed documents and the preliminary responses there is a dire need for a functional secretariat that can perform a number of functions beyond the production of minutes and dissemination. It is therefore important to revisit the establishment of the BNBPU, its constitution, mandate, functions, powers, oversight modalities, mission, vision and objectives in the development of the strategy.

4.3. Discussions and Results of Interviews

As previously mentioned, interviews with selected stakeholders were undertaken to provide an understanding of the institutional, organizational and capacity support required for the BNBPU to undertake its work effectively and consequently contribute to the growth, efficiency and competitiveness of the beef industry. The interview discussions also provided an understanding of the different relationships that exist within the beef industry value chain and perceptions on those relationships.

Based on the findings stemming from the desktop review of selected documents and preliminary interviews the Strategy development the following can be concluded:

- (i) There is a role for BNBPU in directing and participating in the development of the beef industry in Botswana
- (ii) Key messages indicate that there is need to provide strategic interventions that are aimed at strengthening BNBPU to be operational and be able to carry out the following functions:
 - a. Coordination

- b. Capacity strengthening/building
 - c. Data and information sourcing and management
 - d. Knowledge management
 - e. Communication and outreach
 - f. Marketing
 - g. Resource mobilization
 - h. Negotiation
 - i. Advocacy and lobbying
 - j. Leveraging of resources
 - k. Market intelligence gathering
 - l. Partnership building
 - m. Networking
 - n. Project management/monitoring/evaluation
 - o. Self-monitoring and enforcement/regulation
 - p. Secretariat services
- (iii) There is a common denominator in the vision for the beef industry in Botswana by all stakeholders/entities – to have competitive prime beef that ensures good returns for investment
- (iv) Market access is desirable for all – there is a need to explore different options, outline roles and leverage on existing and potential resources in undertaking the different roles including those of regulator, conduit, oversight and policy setting.
- (v) The beef industry must now aim to influence its own future, revisit old structures and evolve to ensure that Botswana's beef is out there in the market without leaving other partakers behind. The new structural dynamics should be able to communicate, liaise, negotiate on all issues associated with their industry including trade, use of technology, consumer marketing, research and development, natural resources, environment, planning, zoning, land tenure, insurance and financing, stakeholder communication, efficient administration, promotion of livestock agriculture and beef industry as an attractive viable business.

BNBPU can be the mechanism for farmers to participate in policy development pertaining to the beef industry through the elaboration of its organisation to be fully operational with corporate governance rules, principles, processes and procedures. In order for the BNBPU to be effective it therefore needs a secretariat that can undertake day to day work and deliver the mandate of the BNBPU.

5. INTERVIEW QUESTIONS AND CONSOLIDATED RESPONSES

i. **DISTINCTIVE COMPETENCIES (Commitment)**

The knowledge, skills, attitudes and values that make your Organization unique

- The Union is run by passionate farmers that are committed to farming;
- The Union is led by experienced farmers that understand the challenges faced by its members.

ii. **VALUE PROPOSITION (Participation and Inclusivity)**

What value is offered by BNBPU to its members?

- The Union exists to protect and advocate for the interests of its members;
- The Union creates a platform for its members to speak with one voice in order to influence the beef industry;
- The Union will advocate for access to potential lucrative markets for beef produced by its members;
- The Union looks to develop its members through training and interaction (benchmark) with other local farmers to transfer skills.
- The Union facilitates networking with strategic partners
- The Union promotes sustainable use of land resources.

iii. **INTERNAL STRUCTURES THAT SUPPORT YOU (Organisational Governance)**

Your Organization's processes, divisions, policies, practices, and mental models/assumptions (culture)

- The Union has an established Council and Executive committee that provides direction;
- The Union has Associations across the country that represent the interests of members at designated regions;
- A Constitution governs the Union.

iv. **INTERNAL STRUCTURES THAT HINDER YOU (Organisational Governance)**

Your Organization's processes, divisions, policies, practices, and mental models/assumptions (culture)

- The Union currently does not have a secretariat to attend to the needs of the union and the associations;
- The Union does not have adequate funding, which affects the union's efficiency in advocating for its members;
- The Union does not have documented processes to guide operations.

v. MAJOR CURRENT CONCERNS

Areas and issues that are 'keeping you awake at night' about your organization

- As a country we do not have a robust strategy towards the development of the beef industry;
- BNBPU should address the insurance issue through the Credit Guarantee Scheme. Insurers perceive farmers as high risk since their product is prone to the severe effects of drought.
- Majority of members (farmers) do not have succession planning in their operations to ensure continuous production.
- There is an overreliance by the farmers on the government. The Union needs to be self-sustaining;
- Farmers tend to focus on technical aspects of farming and less on the business aspects. Education is required to equip farmers with business skills;
- Compliance issues, including traceability of livestock, are a huge concern. The system is not efficient;
- Outbreak of Diseases of economic importance (e.g. FMD)

vi. WHAT ARE THE EMERGING REQUIREMENTS FROM YOUR KEY STAKEHOLDERS

Trends, patterns and Key Driving Forces (KDF's) in the environment?

- There is potential growth for beef and beef by-products to be marketed regionally locally and internationally;
- There is need for value addition and beneficiation in creating more products;
- Farmers need access to roads, communication network and electricity, therefore there is a requirement to invest in infrastructure;
- Associations should be grouped according to specific farming practices, to allow for more targeted interventions;
- Domestic and regional trade should be lobbied for, as local farmers within FMD area have quality products that could benefit them;
- Farmers should practice Cluster management to utilise available resources. When they have clustered the business there is greater potential for growth and sustainability;
- BNBPU should form a farmers' cooperative that will participate actively in the running of the BMC;
- BNBPU advocate for the establishment for an Advisory Body to BMC;
- BNBPU should be able to influence legislation and policies developed. The Union should also initiate legislation and policies;
- There needs to be a Meat Board that facilitates and markets products to importing countries. Should also influence market prices;
- BNBPU should influence training in learning institution to ensure it meets industry needs;
- MoADFS has recently launched the National Agriculture Union, to which the BNBPU is expected to affiliate;
- There needs to be more innovation going forward and adaptation of new technologies in the industry, this includes among others being innovative around policies and legislation.

vii. In Your View, what can be done to ensure long-term sustainability of BNBPU?

- The Union needs to have a full functioning secretariat to carry out the day to day operations;
- Union needs to develop a levy system to raise funds in order to be financially independent; Develop income generating systems including corporate sponsorship;
- Union must educate members on mandate and ensure that there is alignment to that mandate and adherence to it;
- A major portion of the cattle (80%) comes from communal farmers, hence they need to be provided with support in order to ensure continuous productivity.

6. LESSONS LEARNT

6.1. Cattle Council of Australia

This section provides lessons learnt on current realities of alike or similar entities in other selected countries and discusses briefly their key attributes of relevance to the development of the BNBPU 's Strategy. The first discussion is on the Cattle Council of Australia and the second one is on Namibia's beef value chain.

6.1.1. Cattle Council of Australia

The objective of the Council is to represent and progress the interests of Australian beef cattle producers through consultation with, and providing policy advice to, key industry organisations, relevant Federal Government Departments and other bodies regarding issues of national and international importance.

The Cattle Council has established the following committees that provide policy advice:

- Animal health, welfare, biosecurity and environment;
- Research, development and adoption
- Marketing, market access and trade and;
- Industry systems and food safety

To ensure quality and safety of Australian beef to domestic and export consumers, the cattle council has implemented world's best systems and programs.

This Programs include:

➤ **Livestock Production Assurance:**

The program assures Australia export markets the safety of the red meat grown by Australia's producers.

➤ **National Livestock Identification System**

The system allows for identification and traceability of the livestock, allowing Australia to have competitive advantage in global markets.

➤ **Meat Standards Australia**

The Meat Standards were developed to enhance the eating quality consistency of beef and sheep meat, and it takes in to account elements that affect eating quality from the paddock to the plate. (Anon., n.d.)

6.1.2. Namibia's Beef Value Chain in Comparison to Botswana

According to (Van Engelen, et al., n.d.), "Given the countries' similarities, the beef value chains in Botswana and Namibia provide an excellent opportunity for comparative analysis. Except for the fact that Botswana is a larger exporter in value and volume terms, Namibia outcompetes Botswana in most other respects. Its exports have grown faster, especially in terms of volume. It exports more high-value fresh-chilled boneless cuts. It sells more into high-end markets, and it sells at prices that are higher across the board than those received by Botswana. The differences between the two countries in part reflect the major structural change in Namibia's beef value chain."

The following points explain Namibia's better market performance:

- The open export market, has led to participation by the private sector in the beef value chain. Exporters are responsive to changing preferences in export markets due to existing competition.
- The presence of the Meat Board of Namibia provides market research and technical support, facilitates collaborations at the value-chain level.
- The existence of Farm Assured Namibian Meat (FAN Meat) scheme facilitates for good agricultural practices (GAP), good transport practices, good veterinary practices and good manufacturing practices.
- The new marketing strategy of Meatco, Namibia's largest beef processor, represents a shift from selling beef in wholesale commodity markets to selling directly to the final retailer or food-service provider in the end market (e.g. cash-and-carry operations, restaurants). The share of sales to such end-users in Meatco's international sales increased from around 20 percent in 2008 to around 40 percent in 2010.

It is clear that there is a lot to be learnt from established beef unions/cattle associations, particularly from similar markets to ours like Namibia. As part of the strategy development, we will conduct a desk study of the beef institutions identified here. The results of this study will feed into the structure and business model of BNBPU.

7. CONCLUSIONS

The Strategy development elements must seek to meet the following:

- (i) The role of BNBPU in directing and participating in the development of the beef industry in Botswana
- (ii) Key messages indicate that there is need to provide strategic interventions that are aimed at strengthening BNBPU to be operational and be able to carry out the following functions:
 - a. Coordination
 - b. Capacity strengthening/building
 - c. Data and information sourcing and management
 - d. Knowledge management
 - e. Communication and outreach
 - f. Marketing
 - g. Resource mobilization
 - h. Negotiation
 - i. Advocacy and lobbying
 - j. Leveraging of resources
 - k. Market intelligence gathering
 - l. Partnership building
 - m. Networking
 - n. Project management/monitoring/evaluation
 - o. Self-monitoring and enforcement/regulation
 - p. Secretariat services
- (iii) There is a common denominator in the vision for the beef industry in Botswana by all stakeholders/entities, which is to have competitive prime beef that ensures good returns for investment. This will be achieved through an effective industry structure, with complimentary processes and capacities as well as adequate forums for partnerships and strategic alliances.
- (iv) Market access is desirable for all – there is a need to explore different options, outline roles and leverage on existing and potential resources in undertaking the different roles including those of regulator, conduit, oversight and policy setting.
- (v) BNBPU can be the mechanism for farmers to participate in the policy development in regard to the beef industry through the elaboration of its organisation to be fully operational with corporate governance rules, principles, processes and procedures.

8. STAKEHOLDERS INTERVIEWED

INTERVIEWEES	DESIGNATION & ORGANISATION
Dr Akolang Tombale	CEO – Botswana Meat Commission
Mr Madongo Direng	Chairman - BNBPU
Dr John Moreki	Deputy Permanent Secretary -Technical Services (Ministry Agriculture development and Food Security)
Ms Mmadima Nyati	Director NAMPAAD
Dr Racious Moatshe	CEO – Business Botswana
Jester Sealetsa	Southern District Farmers Association
Dr Christopher Tsopito	Kgatleng Farmers Association
Gosata Mosweu	Nata Beef Block Farmers Association
Heerman Spitz	European Union – Minister Counsellor Head Of Cooperation
NDB	HR, RISK and Strategy Managers

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