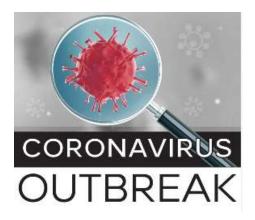




Status Report COVID-19

Exchange South Africa



Abstract Report on the effects of COVID-19 in South Africa Version 8.0 February 2021

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The information in this volume is destined to provide a description of the COVID-19 status and its impact on social and economic life in the 5 Sub-Saharan African countries with cooperation programmes of Exchange vzw. The ambition is to give insights, based on information gathered by Exchange's business development managers based in these countries. Exchange vzw. can not be held responsible for errors, omissions or lack of accuracy and disclaims any liability in connection with the use of this information. Feedback is welcome at info@exchangevzw.be





1. Summary

In this report we will describe the current COVID-situation in South Africa including health statistics, current policy and measures, the EXIT strategy, the economic impact and the specific economic support programmes that have been launched.

Day 1 in South Africa was 5 March. On the 15th of March there was the announcement of National Disaster by the statement of President Ramaphosa on COVID-19 and the travel restrictions imposed. President Cyril Ramaphosa announced that the country will be in lockdown as from midnight 26 March 2020.

The 12th of June marked exactly 100 days since the first person confirmed to have Covid-19 arrived back in the country from a holiday trip to Italy on 3 March. In the 100 days since the man first felt ill and visited his doctor, the country's response has been marked by a scramble to prevent the virus from spreading too far and too fast, a nationwide lockdown and emergency steps to alleviate hunger and job losses as the lockdown had an immediate impact on the economy.

The measures helped the country halt the initial spread of the virus, especially in the first 30 days, where the travel ban had a marked effect.

On the 24th of May, after 58 days of lockdown, President Cyril Ramaphosa addressed the nation and announced a scaling down of the lockdown to Alert Level 3 from 1 June 2020 to gradually open up economic activity, schools and educational institutions.

After 100 days of Covid-19 cases were increasing at the highest rate since outbreak began. The situation in the Western Cape was of particular concern.

After 108 days of Covid-19 lockdown President Cyril Ramaphosa addressed the nation and announced stricter enforcement of Level 3 measures including a ban on alcohol sales in order to conserve hospital capacity.

The 9th of August, the number of recoveries stands at 411.147, which translates to a rate of 73%. The death rate is also relatively low compared to other countries. While South Africa is the continent's hardest-hit nation in terms of infections, the mortality rate – at around 1,8% – is one of the lowest among countries with high numbers of cases. On the other hand, the economic impact of the pandemic is expected to be severe and lately corruption allegations relating to the procurement of Covid-19 supplies have eroded trust between the state and citizens.

President Cyril Ramaphosa has announced that the country will be moving to alert level 2 with bans on travel between provinces and the sale of alcohol and tobacco products being lifted. The easing from level 3 is effective from Monday 17th of August midnight, with trading in liquor and cigarettes set to resume on Tuesday 18th of August.

On 21 September 2020 the **country moves to lockdown alert level 1.** The public health response to the pandemic will focus on preparing for a possible resurgence in cases by increasing coronavirus testing while further reducing transmission.

As of December 2020, the number of Covid-19 cases are rapidly rising in several provinces, and especially in the Western Cape. On Dec. 10th, Health Minister Dr Zweli Mkhize has announced that South Africa has, according to its statistic models, entered a second wave of COVID-19 infections. Western Cape, Eastern Cape, KwaZulu-Natal and Gauteng – are the key drivers of this new wave. The majority of the new cases are from Western Cape, and that is 30% of positive cases today, followed by Eastern Cape (24%), KZN (23%) and Gauteng (17%).





On **Monday night, 28 December**, President Cyril Ramaphosa announced that the nation would be moving **back to level 3 lockdown**, with stricter regulations coming into immediate effect at midnight. This is due to the **sharp rise in infections**, resulting in over one **million infections** reported on 27 December, and fear of a **new variant** (known as **501Y.V2**) that appears to be more contagious. Plus the number of trauma cases has risen, putting an unmanageable strain on the health care system and workers.

On **11 January 2021**, President Cyril Ramaphosa announced the **extension of South Africa's adjusted level 3 lockdown**. The president said that the pandemic in South Africa is now at its **most 'devastating'**, with the number of new cases, deaths and hospital admissions now at the highest point since the coronavirus was first detected in the country in March 2020. **Schools** will now only reopen for the new academic year on **15 February 2021**.

On 1 february 2021, One million Covid-19 vaccines land at OR Tambo Airport. The vaccins will be reserved for health workers. This Covishield vaccine is produced by the Serum Institute in India and was developed by the pharmaceutical company **AstraZeneca** together with the University of Oxford. South Africa was one of the countries where clinical trials were held to assess the drug's efficacy.

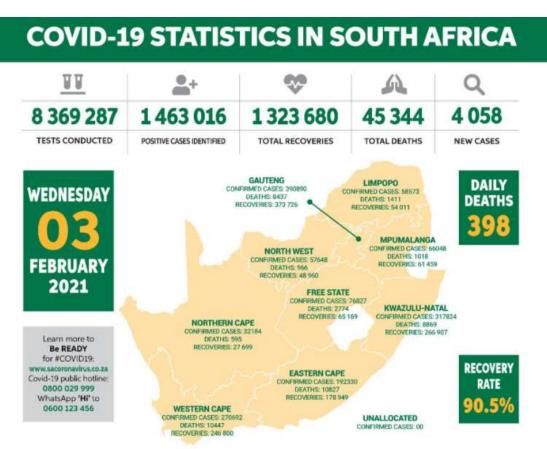
After **Phase 1**, the vaccination of healthcare workers, we will move to **Phase 2** of the national vaccine strategy, which will include essential workers, people over 60 years, people with co-morbidities as well as those living in places such as nursing homes and hostels. In **Phase 3**, we will extend the vaccination programme to the rest of the adult population.





2. General overview and statistics

The latest South African Covid-19 statistics : <u>https://sacoronavirus.co.za/category/press-releases-and-notices/</u>





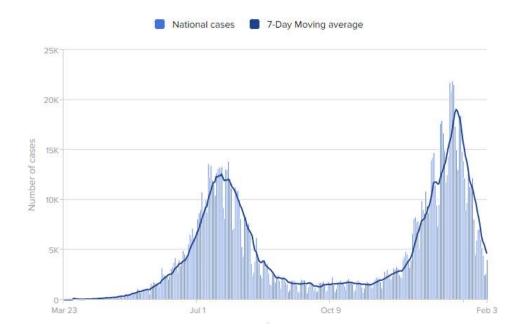


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Province	Total cases for 03 February 2021	Percentage total
Eastern Cape	192330	13,1
Free State	76827	5,3
Gauteng	390890	26,7
KwaZulu-Natal	317824	21,7
Limpopo	58573	4,0
Mpumalanga	66048	4,5
North West	57648	3,9
Northern Cape	32184	2,2
Western Cape	270692	18,5
Unknown	0	0,0
Total	1463016	100,0

See https://covid-19dashboard.news24.com/#national-cases

There are 1 463 016 reported cases, 4 058 new cases in the past 24-hours. Cases increased an average of 4 624 per day for the past week.

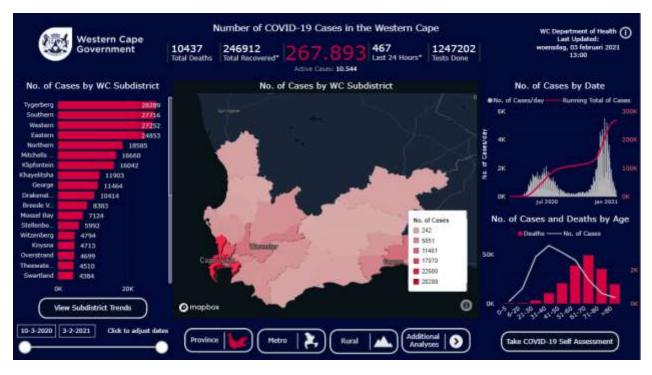






COVID-19 UPDATE IN WESTERN CAPE: THE SITUATION NOW

See https://coronavirus.westerncape.gov.za/covid-19-dashboard



3. Current measures

See <u>https://www.capetownmagazine.com/lockdown</u> and <u>https://www.capetownmagazine.com/coronavirus</u>

With the clear decline in new infections, hospital admissions and deaths, Cabinet has decided to steadily ease a number of restrictions under adjusted Level 3.

- The hours of the curfew will now be from 11pm to 4am.
- Establishments will need to close by 10pm to allow their customers and staff to return home by curfew.
- Faith-based gatherings will be permitted, subject to health protocols.
- Such gatherings may not exceed 50 people for indoor venues and 100 persons for outdoor venues. Where the venue is too small to accommodate these numbers with appropriate social distancing, then no more than 50 per cent of the capacity of the venue may be used.
- Public places such as beaches, dams, rivers, parks and public swimming pools will be reopened subject to health protocols.
- Restrictions on the sale of alcohol will be eased.
 - The sale of alcohol by licensed premises for off-site consumption will be permitted from Mondays to Thursdays, from 10am to 6pm.





- Duty-free shops, registered wineries, wine farms, micro-breweries and micro-distilleries will be able to sell alcohol for off-site consumption during their normal licensed operating hours.
- The sale of alcohol by licensed premises for on-site consumption such as restaurants and taverns will be permitted throughout the week from 10am to 10pm.

South-Africa **maintains the country on coronavirus alert level 3**, indicating the continued high risk of transmission.

Several prevention measures will remain in place.

- Social gatherings, political events, traditional council meetings and gatherings at sports grounds will not be permitted.
- This does not include religious gatherings and funerals and other limited exceptions as detailed in the regulations, such as restaurants, museums and gyms.
- Funerals may not be attended by more than 50 people, and there needs to be social distancing, hand sanitising and mask wearing.
- It remains compulsory for every person to wear a mask in a public space.

Even as we roll-out the vaccination programme throughout the year and as we steadily work to reduce the number of new infections, we will need to continue to observe careful precautions to reduce transmission.

4. EXIT Strategy

Alongside increased testing, the country is improving contact tracing through the deployment of the **Covid Alert South Africa mobile phone app** and the Covid Connect WhatsApp platform. The Department of Health had also developed WhatsApp and SMS systems for people without smartphones to provide them with test results and alert them to any possible exposure to the virus.

While working to prevent further transmission of the virus, the country was also preparing for the time when a vaccine became available, with **South Africa already participating in three vaccine trials** – demonstrating the capability of its scientific community, Ramaphosa said.

Vaccines

On February 1st, 2021, President Ramaphosa announced encouraging progress in the fight against Covid-19. The first **delivery of vaccines** coincided with a decrease in new infections as the **second wave has passed its peak**. The President warned that people should continue to be vigilant and avoid indoor gatherings. Below is the full text of his address.

As I said during my previous address, we are sourcing our vaccines from a number of suppliers.

In addition to the 1 million Covishield doses that we received today; we expect another 500,000 doses from the Serum Institute of India to arrive later in February.





- We have secured 12 million doses in total from the global COVAX facility, which has indicated that it will release approximately 2 million doses by March.
- We have secured 9 million vaccine doses from Johnson & Johnson, commencing with delivery in the second quarter. Johnson & Johnson has contracted Aspen, one of our pharmaceutical companies, to manufacture these vaccines in South Africa.
- In addition, Pfizer has committed 20 million vaccine doses commencing with deliveries in the second quarter.

We are in advanced negotiations with manufacturers to secure additional supplies.

South Africa will also receive an allocation of vaccine doses through the African Union, which has been negotiating with manufacturers to secure vaccines for the entire continent on a pooled basis.

Through the African Vaccine Acquisition Task Team of the African Union, we have to date secured 1 billion vaccines for the entire continent.

Seven hundred million of these will come from the global COVAX facility and 300 million have been facilitated by the African Vaccine Acquisition Task Team.

We will be getting other vaccines that will be donated by various private sector companies to add to the vaccines that our continent needs.

MTN, which is one of our companies that operates across a number of countries on the African continent, has made a donation of \$25 million to procure 7 million vaccines, which will be made available to countries on the African continent within a matter of weeks.

Our scientists estimate that we will likely reach herd immunity once around 67 per cent of our people are immune.

This amounts to around 40 million people in South Africa.

5. Impact

5.1 Domestic and international travel

As of October 1st, travel is again allowed in and out of South Africa for business, leisure and other travel. The South African government has released a revised list of high-risk countries for international travel. The new list indicates a countries from where travelers are not allowed to enter South African borders. "People from high-risk countries who may visit SA fall in the following categories: business travelers, holders of critical skills visas, investors, and people on international missions in sports, arts, culture, and science.

As of November 11th,2020, government has relaxed South Africa's level 1 lockdown rules around international travel, allowing visitors from any country provided they follow health and safety guidelines. all borders will be open subject to Covid-19 negative certificate for all passengers. No more high-risk list of countries.

The foreign office also advises against all but essential travel to the whole of South Africa based on the current assessment of Covid-19 risks. Despite existing international restrictions, local tourism has praised



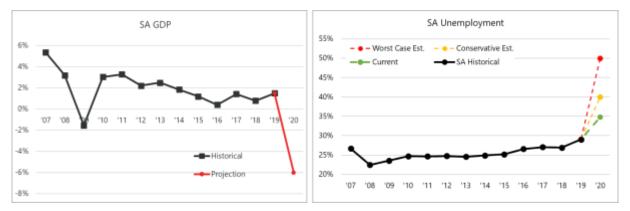


the decision to ease restrictions, especially the removal of the 'high-risk list' which saw travellers from specific countries prohibited from entering South Africa for leisure travel. (source : <u>https://businesstech.co.za/news</u>)

5.2 Economic Impact

The economic impact of the pandemic is expected to be severe and lately corruption allegations relating to the procurement of Covid-19 supplies have eroded trust between the state and citizens.

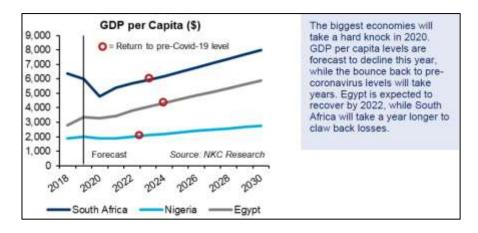
South Africa entered 2020 with weak consumer demand, high and increasing government borrowing, one of the highest unemployment rates in the world, unstable network infrastructure and an enduring legacy of inequality and economic exclusion. GDP growth in 2019 was just 0,3%, a further contraction from the 0,8% registered in 2018, and the official unemployment rate was 29,1% in the third quarter of 2019. The pre-crisis growth outlook for 2020 was 0,9%.



Impact of COVID-19 on South African GDP and Unemployment (National Treasury, 2020; South African Reserve Bank, 2020)

Economic Forecast

South Africa is not expected to return to a pre-coronavirus GDP per capita level before 2023, largely due to the country's poor track record in recent years.







5.3 Consequences for private entrepreneurs

The following is an extract from a News24 article about President Ramaphosa's newsletter:

President Cyril Ramaphosa has praised what he calls a "new breed of young entrepreneurs" for coming up with "home-grown solutions to the contemporary challenges we face" as the country continues to battle the economic shock of the Covid-19 pandemic.

South Africa was already in recession when the nationwide lockdown was instituted in late March, and South Africa's already-high official unemployment rate is expected to surge as a result of the pandemic's impact on businesses, while tax revenue is expected to plunge by around R300 billion. According to a new study, roughly three million people may have lost their jobs between February and April. The country's youth unemployment is particularly acute.

In his weekly newsletter, Ramaphosa said even in South Africa's "darkest hour," the country has had to focus on green shoots of renewal, namely young entrepreneurs, which he said were the "silver lining to the dark Covid-19 cloud".

"Our economic recovery cannot wait until the coronavirus pandemic is over. It needs to start now. One of the defining developments during the lockdown was how businesses in the townships and rural areas came into their own as people were not able to travel around much," he said.

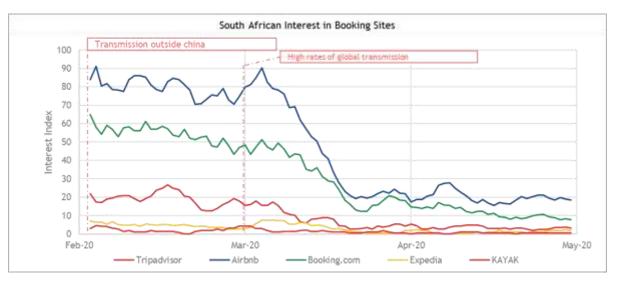
Ramaphosa named a number of young entrepreneurs who started business either just before or during the pandemic.

5.3.1 Tourism (including Hotel) sector

Total income for South Africa's tourist accommodation industry decreased by 81.2% in August 2020 compared with August 2019, Statistics SA announced on Monday.

This is in nominal terms, therefore, at current prices. There was a 79.4% decrease in the number of stay unit nights sold and a 14.3% decrease in the average income per stay unit night sold.

Behaviour on booking sites in South Africa has largely reflected global trends; Airbnb experienced a 77% decline in traffic from a peak in March, with Booking.com seeing an 80% decline over the same period. The stage of the country's pandemic, with infection rates still increasing and tourist activity restricted, means that booking interest is yet to show noticeable signs of recovery.







Local interest in booking sites (Google Trends, 2020)

In August 2020, all accommodation types recorded large negative year-on-year growth in income from accommodation. The main contributors to the 82.4% year-on-year decrease in income from accommodation were: hotels (-86.2%) and "other" accommodation (-74.9%) Income from accommodation decreased by 88.9% in the three months ended August 2020 compared with the three months ended August 2019. The main contributors to this decrease were: hotels (-90.2%), and "other" accommodation (-85.9%).

Seasonally adjusted income from accommodation increased by 99.0% month-on-month in August 2020 and increased by 47.2% month-on month in July

Tshifhiwa Tshivhengwa, CEO of the Tourism Business Council of SA (TECSA), points out that the month-on-month increases must be seen against the just about zero activity base during harder coronavirus lockdown levels.

For him the latest data is indicative that people have started travelling again. He however only expects a clearer picture will only emerge once data for September becomes available.

5.3.2 Manufacturing Sector

The manufacturing sector has a global supply chain and China is one of the main suppliers of components for large industries. Business are also pulling back on orders for goods due to the impact of the spreading coronavirus. Global supply chain disruptions, the weak rand and disruptions on the production-side due to the government-imposed lockdown will negatively affect this sector..

5.3.3 Agro-Industry Sector

Financially distressed small-scale farmers who have an annual turnover of between R20.000 and R1 million could apply for R1.2 billion in government funding.

The following media release of the Western Cape Minister of Agriculture dated 26 January 2021 provides a good description of the impact on the Agro-industry in the Cape Province.

"Yesterday, I wrote to the National Minister of Agriculture, Rural Development and Land Reform, Thoko Didiza, to request her assistance in lifting the third ban on wine and other liquor sales.

This follows the request by the Premier of the Western Cape, Alan Winde, to the Minister of Health, Dr Zweli Mkhize, last week.

The Western Cape Government accepted the restrictions that were announced by the President as the last resort in order to protect our healthcare system during an unprecedented surge and over a period of time when alcohol-related trauma was expected to spike.

We, however, argued that it should be for fourteen days only and reviewed every seven days thereafter, based on scientific evidence.

Now nearly a month after the restrictions came into place, we believe that the evidence clearly points to the need to relax these restrictions in order to save jobs.

We are now experiencing a decline in active cases and newly reported daily Covid-19 cases. All other indicators are also pointing to the Western Cape having passed its peak, and that the surge – which caused such pressure on the health

system - being over.





Furthermore, our department of health in the Western Cape has put in place a number of measures to increase capacity, and we have adequate beds, oxygen and staff to provide care to every person who needs it.

That is why wine sales should now be allowed in line with the "differentiated approach" envisaged during the President's speech of 14 December 2020.

Wine grapes represent 50,3% of the 181 233 ha under fruit production in the Western Cape Province. The replacement value of these wine grapes amounts to R33,94 billion.

Wine is the third biggest export product of the Western Cape economy and contributes 6,5% to the value of exports from the Province.

The Department estimates that 45 610 people work in the industry's primary production side and supports the livelihoods of 228 053 people.

During the initial stages of the Covid-19 lockdown, South Africa was the only major wine exporting country banning wine exports. The result was that we handed market share on a platter to some of our competitors.

Even after the domestic trade of wine was resumed with the introduction of Level 3 regulations, the sales did not return to normal levels.

The result is that a quarter of annual sales were lost, which adds to cash flow problems for producers. We cannot be putting even more pressure on this battling sector. We must be doing everything possible to help them grow and employ more people.

Our research also shows that the first two weeks of the ban cost the Western Cape R1 billion. This has impacted 1893 direct jobs in the retail sector and 905 induced and indirect jobs across the value chain resulting in 2798 jobs being compromised.

If the ban continues for the full month, which it now seems likely to do, it will end up costing the economy R2 billion, impacting 5596 jobs in our province."

End of media release of 26/1/2021

5.3.4 Circular Economy, Sustainable and Renewable Economy

Waste management programmes will remain very relevant in the post-pandemic era.

5.3.5 Services Sector

During this challenging time, telcos have performed reliably and consistently under tremendous strain to support remote working, video streaming, and business continuity, although their network performance may have slowed in some cases. The COVID-19 outbreak is thus highlighting the importance of connectedness. Telecom services appear to be the common thread keeping people united as individuals and helping businesses weather the crisis.

5.3.6 Example report of economic impact in Witzenberg Municipality

Source : Witzenberg Municipality – LED staff (July 2020)

- The Tourism sector was one of the hardest hit sectors in Witzenberg. Many establishments struggled, with the frustration from some tourism establishments evident regarding the requirements for funding support from National Government.

- In Ceres, a restaurant & bakery closed their doors (the bakery moved their premises)
- A wine boutique closed their doors
- We were aware of an after care crèche that closed their doors





- There were instances of accommodation establishments that had to retrench workers

- The wine sector experienced a big hit due to the ban on alcohol (tourism spin-off of wine tastings also affected)

- The wedding venue subsector of tourism also experienced a big hit, as weddings were cancelled

- The lack of continuation of tourism festivals results in a big financial knock, as for example Tulbagh relies on the tourist feet that festivals bring in

- There were instances of salary cuts of personnel of some businesses
- One big opportunity is the outdoor experience which might be marketed more aggressively

- The agriculture sector (largest sector) in Witzenberg was not very hard hit (due to it being able to continue during Lockdown) and assisted in keeping cashflow coming in to the local shops. Challenges were however experienced with the exports at the ports (there are companies that are opting to re-route transport via other ports, which will increase transport costs)

- The recycling sector was also very hard hit with the lockdown regulation making it difficult for the informal traders to recycle. The increased risk of infection is a big barrier for these traders, as there are no income security if they get ill. There is a lack of a common, local recycle facility. These traders were difficult to provide support to during the lockdown, due to telephonic challenges. It became apparent how important email will be to these traders (and the access of it).

6. Government support to local economy

Small, Micro and Medium- Sized Enterprises ("SMMEs") Support Intervention

The Department of Small Business Development has introduced a "SME Support Intervention" which involves a Debt Relief Fund and a Business Growth/Resilience Facility to mitigate the impact of the expected economic slowdown on SMMEs in South Africa.

The Department has also made over R500.000.000 available to the Debt Relief Fund, and the SMME Finance Scheme will comprise of soft-loan funding for a period of 6 months from 1 April 2020.

The Business Growth/Resilience Facility will provide working capital, stock, bridging finance, order finance and equipment finance to small businesses which supply in-demand medical supplies.

Furthermore, the Department of Tourism has made an additional R200,000,000 available to assist SMMEs in the hospitality and tourism sector.

In order to qualify for the SME Support Intervention relief, there is a certain criteria which includes, inter alia, that:

- the business must have been registered with CIPC by at least 28 February 2020;
- the business must be 100% owned by South African Citizens;
- employees must be 70% South Africans;
- priority will be given to businesses owned by Women, Youth and People with Disabilities; and
- the business must be registered and compliant with SARS and the UIF.

7. Conclusions and Recommendations

The South African Government has implemented several relief measures which, at this stage, focus on providing support to SMMEs as well as in providing tax relief, unemployment support, support for black entrepreneurs who manufacture and supply a range of medical products and various loan funding to help support vulnerable South African businesses as a result of the COVID-19 pandemic.





Further relief has been provided by the Partner Banks together with independent private parties and organizations to help assist the country overcome the detrimental effects of COVID-19.

8. Useful links for additional information and further reading

More COVID-19 information is available at several internet websites:

The official portal <u>https://sacoronavirus.co.za/</u> contains a wealth of information on Covid-19, including links to other sources and daily updates including real-time statistics.

The Western Cape Government has its own webpage with daily updates and a breakdown of statistics for all municipalities in the province: www.coronavirus.westerncape.gov.za

https://www.nicd.ac.za/

https://www.timeslive.co.za/

https://www.news24.com/news24/southafrica/coronavirus

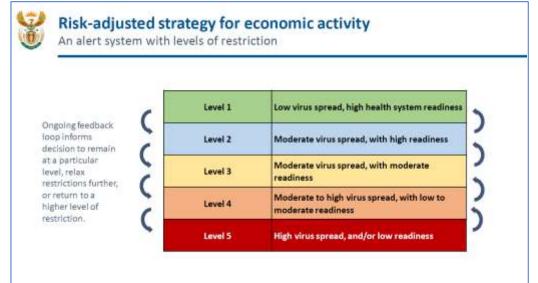
https://ourworldindata.org/coronavirus





9. Appendix

Alert system in South Africa:



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	Sectors permitted	Transport restrictions	Movement restrictions
Level 5: High virus spread, and/or low health system readiness	Only essential services	Bus services, taxi services, e-hailing and private motor vehicles may operate at restricted times, with limitations on vehicle capacity and stringent hygiene requirements	No inter-provincial movement of people, except for transportation of goods and exceptional circumstances (e.g. funerals)



Level 3: Moderate virus

spread, with moderate

readiness

Books and educational products

Automotive manufacturing

copacity)

Chemicals

Cement and steel Machinery and equipment **Global Business Services**

Transnet at 100%

Bottling

E-commerce and delivery services

Clothing and textiles manufacturing (at 50%

SANRAL construction and maintenance



Risk-adjusted strategy for economic activity Alert system: Level 4 Sectors permitted **Transport** restrictions Movement restrictions All essential services, plus: Food retail stores already permitted to be open permitted may sell full line of products within existing stock All agriculture (horticulture, export agriculture including wool and wine, Bus services, taxi services, e-No inter-provincial floriculture and horticulture, and hailing and private motor movement of people, related processing) Level 4: Moderate to vehicles may operate at all except for Forestry, pulp and paper high virus spread, times of the day, with transportation of goods Mining (open cast mines at 100% with moderate limitations on vehicle and exceptional capacity, all other mines at 50%) readiness capacity and stringent circumstances (e.g. All financial and professional services hygiene requirements funerals) Global business services for export markets Postal and telecommunications services Fibre optic and IT services Formal waste recycling (glass, plastic, paper and metal) Risk-adjusted strategy for economic activity Alert system: Level 3 Sectors permitted Movement restrictions Transport restrictions Licensing and permitting services, deeds offices and other government services designated by the Minister of Public Service and Administration. Take-away restaurants and online food delivery Bus services, taxi services, e-hailing and Liquor retail within restricted hours private motor vehicles may operate at all **Clothing** retail times of the day, with limitations on vehicle Hardware stores capacity and stringent hygiene Stationery, personal electronics and office requirements No inter-provincial equipment production and retail

Limited passenger rail restored, with

stringent hygiene conditions in place

restriction on the number of flights per day

and authorisation based on the reason for

Limited domestic air travel, with a

travel

16

movement of people, except

circumstances (e.g. funerais)

for transportation of goods

and exceptional





	Sectors permitted	Transport restrictions	Movement restrictions
Level 2: Moderate virus spread, with high readiness	Construction All other retail All other manufacturing Mining (all mines at 100% capacity) All government services Installation, repairs and maintenance Domestic work and cleaning services Informal waste-pickers	Domestic air travel restored Car rental services restored	Movement between provinces at Level 1 and 2 restrictions
Risk-adju Alert systen	isted strategy for e	conomic activity	
	isted strategy for e	Conomic activity	Movement restrictions

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