

**INDLULAMITHI  
SOUTH AFRICA SCENARIOS**

**2030**

**LOOK ABOVE THE TREES**



**SOUTH AFRICA  
SCENARIOS 2030**



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# INTRODUCTION

**What would a socially cohesive South Africa look like?  
And to what degree is this attainable by 2030?**

Indlulamithi South Africa Scenarios 2030 is a multi-stakeholder, research-driven initiative that seeks to re-invigorate our search, as a nation, for ways to create a society where all people experience a sense of belonging and solidarity. A South Africa where all have opportunities to build a better life. A nation where everyone can feel they can influence those in positions of power.

*Indlu-la-mi-thi* is the Nguni name for giraffe. It can be directly translated as “above the trees”. Indlulamithi South Africa Scenarios 2030 encourages big-picture and far-horizons thinking on the future of our country.

Indlulamithi will provide tools – in the form of scenarios, research, and facilitated workshops, downloadable

presentations and booklets – to assist us to imagine alternative futures more than a decade from today. These scenarios aim to focus both leaders from different sectors and people from all walks of life on the key questions of:

***What would a socially cohesive South Africa look like?  
And to what degree is this attainable by 2030?***

The project is a response to the reality that, despite great progress over the past two decades, South Africa still faces major challenges. As a nation we are struggling to deal with a confluence of inadequate economic growth, widespread unemployment, sharp inequalities, low levels of fixed investment and frail levels of social capital. Cumulatively, these have a major impact on the living standards, safety, education and health of our people.

In 2017, a group of representatives from government, labour, academia, business and other stakeholders came together to establish Indlulamithi as a quest for change, centred on a long-term strategic view of South Africa.

Indlulamithi seeks to facilitate an open conversation on visions of a South African society that is socially

## WHY 2030?

The year was chosen to coincide with the National Development Plan (NDP) timelines as well as those of the UN’s Sustainable Development Goals (SDGs).

It also covers three national election cycles in South Africa – 2019, 2024 and 2029 – and two local government election cycles – 2021 and 2026.

The dates also cover three Soccer World Cups in 2022 (Qatar), 2026 (Mexico/USA/Canada as joint hosts) and 2030 (possibly Uruguay-Argentina-Paraguay joint bid, or England), three Rugby World Cups in 2019 (Japan), 2023 (France), 2027 (possibly Argentina), and three Summer Olympic Games (Tokyo 2020, Paris 2024 and Los Angeles 2028).

integrated and where communities and institutions aspire to eradicate the social and economic inequalities that cause exclusion and injustice.

*Indlulamithi* seeks to help South Africans realise a common purpose and shared vision that focuses on appreciation of our diversity and on solidarity as a means to development and progress.

The project is led by Professor Somadoda Fikeni and is supported by a group of diverse stakeholders from government, labour, civil society and business.

This chosen focus – on social cohesion – emerged somewhat surprisingly for those hosting the initial meeting, who expected the gathering of leading economists, businesspeople, NGOs, retired jurists, trade unionists and public servants to coalesce mostly around the questions of the future of the economy. But many argued that unless social cohesion in its various dimensions is addressed – be it through reconciliation, or addressing inequality, or crafting a national identity, or rural/urban divides – our economic development strategies will flounder. And economic growth that doesn't promote social cohesion might also take South Africa down a different road.

Following a structured scenario development methodology, researchers from MISTRA began interviewing a range of people about social cohesion to explore what its dimensions would be – and what are

the long-term prospects for achieving more social cohesion in South Africa.

The *Indlulamithi* project was intent on ensuring the involvement of a wide range of interviewees from every sector of South Africa and across all age groups, making sure that those young and unemployed were prominent among those interviewed.

These interviews and months of intense research yielded 25 variables impacting social cohesion (see the list of variables on page 7).

This research revealed both the 'usual suspects' of key issues including the potentially divisive effect of the 4<sup>th</sup> industrial revolution on South Africa's

## SOCIAL COHESION

Social cohesion refers to the levels of integration and inclusion in communities and in society at large. Often it reflects various measures of participation or non-involvement in social organisations or institutions. It is shaped by disparities in income and wealth as well as by levels of interpersonal and intergroup trust. Crime rates and frequencies of violence, as well as overall wellbeing and the general health of populations are often mirrored in measures of social cohesion. It is often encapsulated via expressions of common values and manifested in senses of nationhood and of shared ethics and ideals.

continued high rates of unemployment, the South African middle class remaining small and vulnerable, the deepening of challenges around the education and health systems, and the continued impact of high CO<sup>2</sup> emissions. Negotiations around land, the impact of continued urbanisation and the expansion of social welfare regimes to address ongoing poverty were also important variables identified.

Some of the research drew on the best 'overview' research in particular topics and on recent syntheses of scholarly research pertinent to the National Development Plan's strategies and developmental pathways. Early childhood development and mother-tongue instruction were identified as key areas that need to be strengthened to ensure that learners succeed in later years. Young South Africans remain vulnerable and exposed to a variety of assaults, with sexual abuse generally and human trafficking being identified as particular dangers.

These scenarios have tried to build these dynamics into their design.

Another major concern is that the

notion of the South African family needs to be seriously recast. Only a third of SA's children are being brought up by two partners. A third are raised by their single mothers, and a further third are orphans, most times brought up by their grandmothers.

Our 'noisy democracy' and the roles of the Constitution, the Constitutional Court, civil society and the media – notwithstanding the

spread of fake news – are explored as foundational forces which hold those in power accountable and facilitate transparency.

The ‘incomplete democratic transition’, accompanied by continued contestation around reconciliation, will likely see intensified resentment and resistance across race lines. At its core will be debates around reconciliation into and towards ‘what’? Many respondents rejected the notion that South Africans must simply reconcile themselves to societal structures inherited from colonial and apartheid experiences.

At the same time, respondents felt that social solidarity and sacrifice will become more central to developing and entrenching specifically South African values.

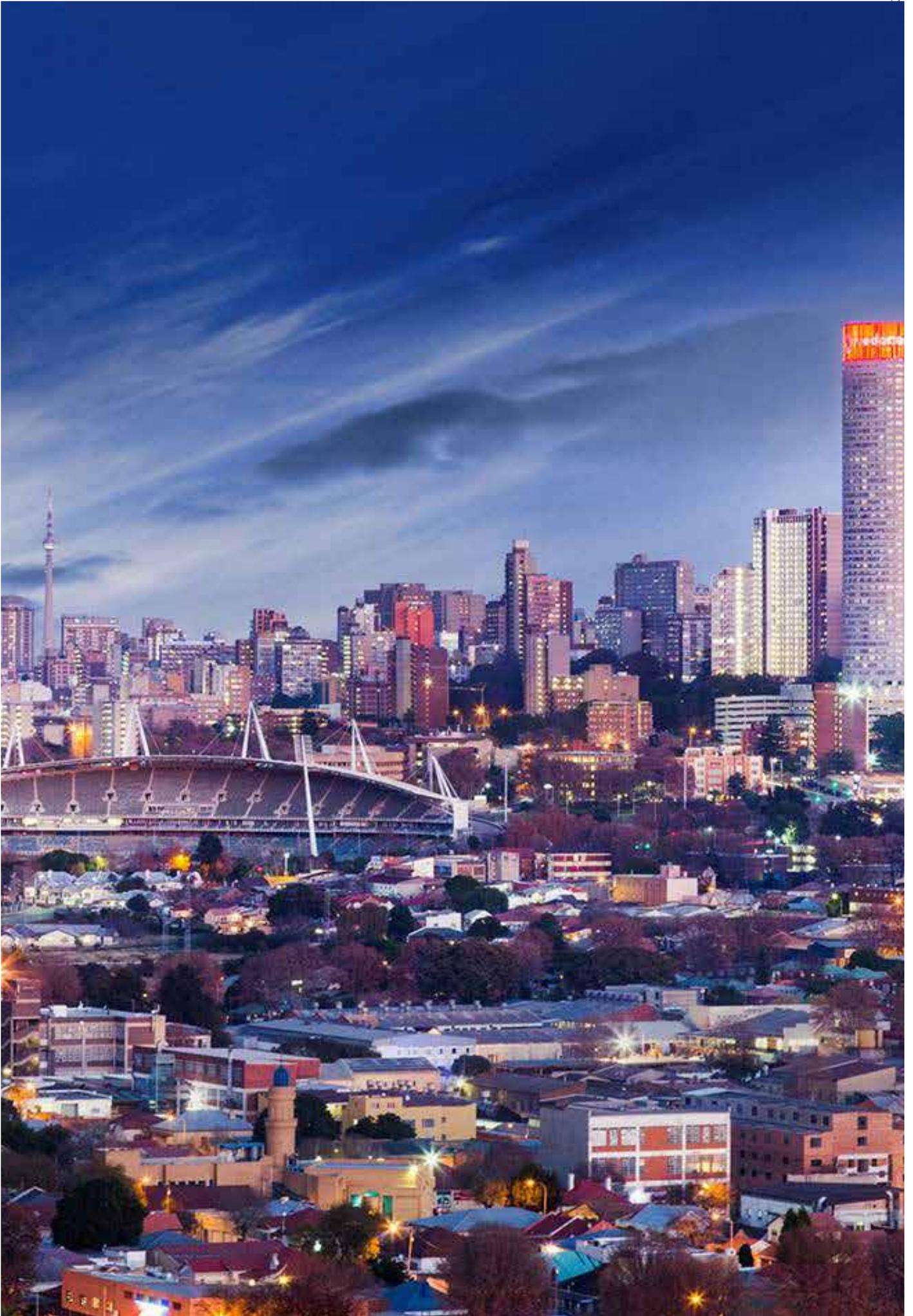
As far as the state and politics is concerned, state capacity was highlighted as a key concern, though there was speculation that with improvement in skills from greater access to tertiary education, and possibly from more rigorous selection and training for public service, we could see a steady improvement in South Africa’s bureaucracy.

Corruption was deliberately separated from consideration of crime, because of the former thriving in the context of poor governance, diverting scarce resources into the pockets of a few.

These variables – 25 in all – were then distilled into three Key Driving Forces: Societal Inequality, Reconciliation, Resistance and Resentment (RRR) and Institutional and Leadership Capacity. Please see page 9 for an overview of these three KDFs and other methodological issues.

Scenarios are not meant to be visions or predictions of the future.

The key conversation *Indlulamithi* hopes to engender is: if any of these three scenarios come to the fore, do we have the right policies and strategies to quickly adapt and move away from the undesirable elements of a given scenario and, at the same time, can we move skillfully to take advantage of the positive elements of any of the scenarios?



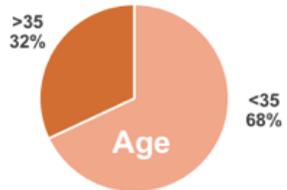
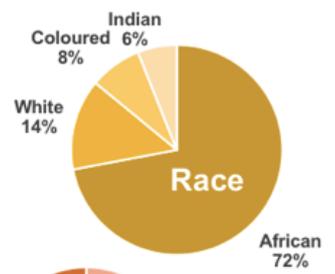
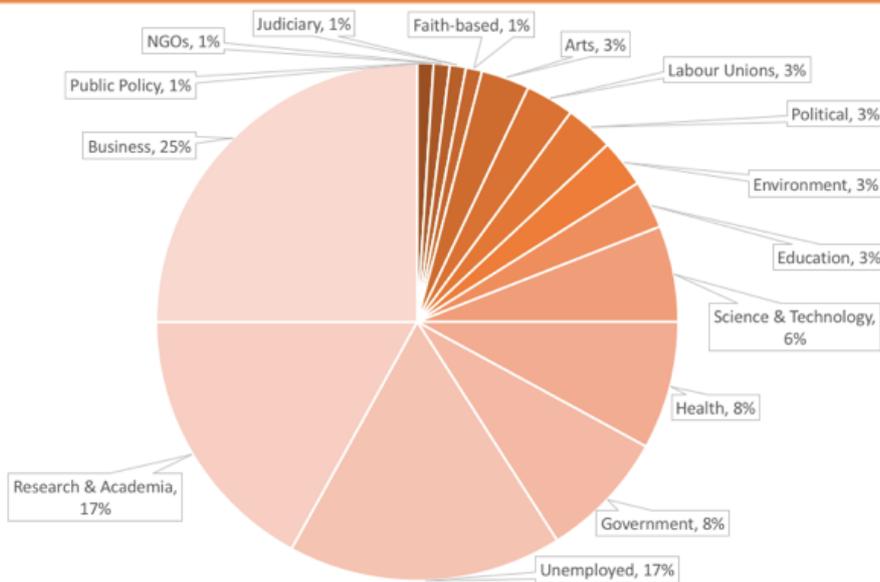
# INDLULAMITHI SOUTH AFRICA SCENARIOS 2030

## THREE SCENARIOS FOR SOUTH AFRICA

### What would a socially cohesive South Africa look like? And to what degree is this attainable by 2030?

The methodology for *Indlulamithi South Africa Scenarios 2030* included formative research, desktop study and extensive interviews with both individual experts and focus groups representative of South Africa’s diversity in terms of gender, age, race and class. The project conducted in-depth qualitative consultations with 150 ‘core participants’, through interviews, focus groups and online discussion platforms. A diverse range of participants was sought.

**A diverse pool of ~ 150 participants identified = 60 Interviewed, 20 Harambee Youth & 70 Online Platform...**



This primary data was complemented by meta-analysis and reviews of existing research, the commissioning of specific research papers, as well as regular briefings and workshops through which findings were validated and interrogated. This included:

### 1. 60 in-depth interviews with sectoral leaders

Interviewers asked participants to reflect on what they perceived as the key threats to social cohesion between now and 2030. They also asked what possibilities there are for overcoming these threats and what opportunities might we leverage and the steps it would take to start growing levels of social cohesion now and in the new future. Interviews ranged from 30 minutes to 2.5 hours and were transcribed and then thematically analysed by the research team.

### 2. Focus groups with job-seeking youth

Recognising that the sectoral leaders we had interviewed had skewed our sample towards an older demographic, we worked with Harambee (<http://harambee.co.za/>) to conduct youth groups. All of

these young people were job-seekers; including many hailing from rural provinces. In an attempt to improve gender demographics in our overall



sample, many of the focus group participants were women. Focus group discussions were modelled on our interview questions, but also included more creative exercises in which young people ‘argued for’ and visually depicted their version of the future.

### 3. Online platform with a further 70 youth

In collaboration with AudienceNet (<https://www.audiencenet.co.uk/>) Indlulamithi hosted an online platform,



Figure 1 Taken from Indlulamithi/Audience Net report

convening youth from across the country in an online conversation about the future of social cohesion. Here, youth were asked about the challenges they believe were most pressing in the country, as well as their hopes and fears for the future. Some created and posted images to illustrate their points.

**4. Research conference** Having gathered a significant amount of primary data, the project sorted this data into emerging themes. It became clear that there were some questions arising from the research that required further expert opinion. The research conference assembled academics and practitioners from a diverse array of fields to address

## VARIABLES

This is a brief summary of the variables:

1. We will struggle to absorb low-skilled **labour** in the industrial sector but will see improved **absorption** in high-skilled and service sectors.
2. Despite improved labour protection, job losses, wage decreases, automation and casualisation will deepen the **insecurity of workers**.
3. Continuing high rates of **youth unemployment**.
4. The South African **middle class** will continue to be a small and volatile group.
5. Overall **inequality** will remain high.
6. Non-communicable chronic **illnesses** will become South Africa’s leading causes of death, compounding the HIV/AIDS and TB burdens.
7. South Africa will remain a high emitter of CO<sup>2</sup> and effects of **climate change** will not be adequately addressed, further widening inequality.
8. **Land reform** will be negotiated through elite competition.
9. **Urbanisation** will accelerate alongside rural poverty.

10. Current **social welfare** regimes will continue to marginally alleviate poverty.
11. We will see steady improvement in **early childhood development**.
12. We will see continued success in access to **education**, while concerns over quality and equity persist.
13. Increased **funding** for (and access to) **tertiary education** will see greater youth absorption into a skills-based economy.
14. **Civil society** will continue to hold the State accountable.
15. **The number of single parents** and female-headed households will increase.
16. While overall **crime** rate will stabilise, particular crimes will escalate with women, children and the poor remaining targeted disproportionately.
17. South Africans will wrestle over the **Constitution**.
18. Without meaningful **reconciliation**, we will see intensified resentment and resistance.
19. Investigative **journalists** will continue to hold the state to account.
20. **State capacity** will remain weak but it will be more inhibiting of corruption.
21. **Political leadership** will be expressed through increased coalitions and a rising youth voice.
22. We will see an increased commitment to **long-term thinking** in policymaking.
23. **Regional trade** and investment will continue to improve, with regional immigration as a major area of contestation.
24. **Social solidarity** and **sacrifice** albeit contested, become more central South African values.
25. South Africans will on balance benefit from **southern African growth** and BRICS membership.

the identified themes. These included specific insights into intergenerational woundedness, the future impacts of climate change, the nature of human trafficking in South Africa, mother-tongue education and gender-based violence.

The conference also commissioned papers to better understand shaping dynamics of South Africa's economy, global context and location, and long-term growth prospects.

During this period, *Indlulamithi* drew on recent reports and monographs from organisations working in related fields, including the *Mandela Initiative*, the *Institute for Security Studies* and the *Vumelana Land Scenarios*.

**5. Distilling the variables:** for the purposes of the *Indlulamithi South Africa Scenarios 2030* exercise, 'variables' refer to a discrete set of hypotheses, or intuitions, about the way certain phenomena might unfold in the future. These 'hunches' are informed by research, and while they seek to capture and understand key trend lines, and dynamics in each field, they are not 'predictions' about the future of the variable. Twenty five variables were identified. Each of these has a more in-depth rationale and explanation which can be accessed at <http://sasenarios2030.co.za/research/>. These variables, and the understanding of how they each shape South Africa's current reality and how they might shape South Africa going forward constitute the 'DNA' on which the *Indlulamithi* scenarios were built.

**6. Ranking:** having formulated the variables and interrogated their likely range of outcomes and impacts, the project ranked them in terms of their certainty of outcome and their level of likely impact. We asked: how certain can we be about the trajectory of this variable? What impact will this variable, as it changes and develops, have on social cohesion? Those variables identified as both the most **uncertain** but also the most **impactful** were then synthesised into three Key Driving Forces (KDFs), ie conceptual areas most likely to shape social cohesion in South Africa going forward. These KDFs serve as the 'scaffolding' for the scenario storylines. These are the three amalgamated KDFs: Social Inequality; Reconciliation, Resistance and Resentment; Institutional and Leadership Capacity.

# KEY DRIVING FORCES

Those variables identified as both the most uncertain but also the most impactful were synthesised into three Key Driving Forces (KDFs). These are conceptual areas most likely to shape social cohesion in South Africa going forward. These KDFs serve as the scaffolding for the scenario storylines.

## KDF 1 Social Inequality

*Indlulamithi* participants shared how they understood and experienced inequality in South Africa, which was described in both material and immaterial terms. There are stark inequalities in income, access and assets: the distributions of each are heavily informed by race, gender, generation and spatial location. While rooted in a long history of colonialism and apartheid, these inequalities are also propelled by more contemporary forces, including climate change and new technologies. As a Key Driver, the focus on Social Inequality is intended to capture this complex web of social, historical and economic features which have, and are likely to have, profound effects on the future of social cohesion in South Africa. Three key considerations informed this river:

**Asset-based wealth:** the top 10% of income earners received 60–65% of total **income** in South Africa.<sup>1</sup> 10% of South Africans hold 90–95% of the **wealth**: the biggest long-term driver of inequality. Precisely because of this lack of assets, the position of the South African middle class is deeply volatile. **Racial inequality** remains stark with

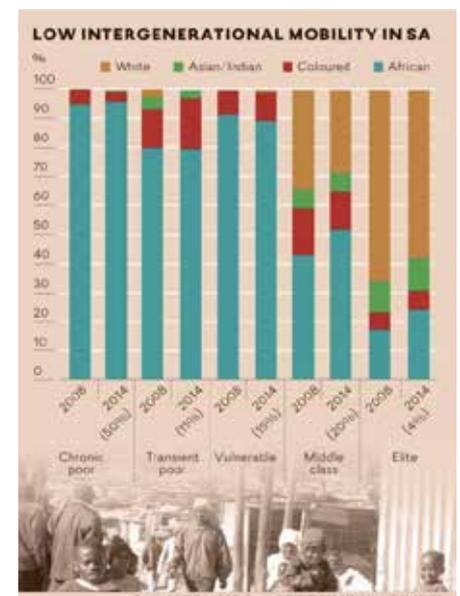
white South Africans experiencing better quality of life on all major indices.<sup>2</sup> Meanwhile, intra-race inequality is also increasing.

**Women** are more likely to be poor than men, and also most affected in times of crisis such as climate change, emerging epidemics and by violent crime. In 2015, one in five South African women experienced intimate partner violence.<sup>3</sup> Reported rape averages at 109 per day,<sup>4</sup> with a conviction rate as low as 8.4% in 2012.<sup>5</sup> Like women, LGBTQI+ communities are more likely to be vulnerable and marginalised.

According to Stats SA, **41% of households are currently female-headed**. This number is steadily increasing and a great many households are headed by grandparents. There are important questions to be asked about the social disconnectedness of working-age men, many of whom are unemployed and do not benefit from social grants.

**Spatial inequality** informs access to jobs, public space, public services and social capital. As the country becomes increasingly urbanised, inequality is

further entrenched: people live far from economic centres with high transport costs. Inequality between rural and urban, as well as between different provinces, is deepening. Large portions of the country's rural and urban dwellers have insecure tenure and volatile land rights, while land and property ownership remains vastly unequal. Meanwhile, the wealthier are increasingly likely to privatise their



lives, seeking private health, education, energy supply, security, transport and entertainment and even obtaining or renewing passports and licences online. The aspiration to 'opt out' of public

<sup>1</sup> Anna Orthofer (2016) South Africa needs to fix its dangerously wide wealth gap'. <https://theconversation.com/south-africa-needs-to-fix-its-dangerously-wide-wealth-gap-66355>

<sup>2</sup> Institute for Race Relations (2017) Quality of Life Index.

<sup>3</sup> South African Demographic and Health Survey 2016

<sup>4</sup> SAPS Crime Stats 2016/2017

<sup>5</sup> Mercilene Machisa *et al* (2017). Rape Justice In South Africa: A Retrospective Study Of The Investigation, Prosecution And Adjudication Of Reported Rape Cases From 2012. Pretoria, South Africa. Gender and Health Research Unit, South African Medical Research Council.

institutions, where queues are long and services unreliable, is leaving less and less room for public participation and communion.

**Intergenerational poverty**

perpetuates long-term structural inequality: if parents are among the poorest quintiles, their children have a 90% chance of being ‘stuck’ in poverty, ie remaining in that quintile of wealth all of their lives. **Sixty percent of children in South Africa live in households below the upper-bound poverty line.**<sup>6</sup>

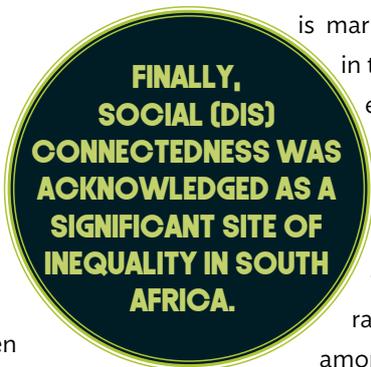
Inequality impacts and is reinforced at a very young age. Poor **early childhood development** is a key determinant of intergenerational poverty. In contemporary South Africa, 27% of children in South Africa are ‘stunted’ due to inadequate early childhood nutrition. This has stark implications for longer term physical and cognitive development. Stunted children generally perform more poorly at school and are at greater risk of non-communicable diseases.<sup>7</sup>

While access to **basic education** is now almost 100%, inequalities in the quality of education provided are stark, determined by income, spatial geography and race. In South Africa of 2018, only around half of all pupils

who start Grade 1 complete matric. Of all pupils starting Grade 1, only about 6% receive university degrees, although many others do achieve some post-school qualification and skill enhancement.

More than half of South Africa’s young people are **unemployed** – the highest level of youth unemployment globally – and having a matric does not radically alter their chances of accessing work.

If a matric certificate is leveraged towards a tertiary qualification, there is marked difference in the likelihood of employment.



University graduates are most likely to find jobs, but in 2018, rates of unemployment among graduates are also rising. *Indlulamithi* participants

showed acute awareness about how inequality will affect future work, education and labour market environments.

Whichever economic growth path SA finds itself on over the next 12 years, the stubborn persistence of inequality will need to be taken into account. Economic growth strategies will need to be both *transformative*, addressing the root causes of inequality, and *inclusive* so that more and more South Africans can benefit from such growth.

Finally, **social (dis)connectedness** was acknowledged as a significant site of inequality in South Africa. Job-seeking youth felt that their biggest barrier to entry was not knowing the right people. Being networked is essential for getting a foot in the door — with a potential employer, landlord, investor, NGO-provider or public servant. Participants recognised both the injustice of patrimonial or nepotistic networks, and the value of social groupings like stokvels, churches and similar institutions.

**KDF 2  
Resistance,  
Resentment and  
Reconciliation (RRR)**

*Resistance, Resentment and Reconciliation (RRR)*, whilst underlying a number of phenomena, is to be seen as a driving force in itself manifested in various dimensions such as identity, values and the public discourse. Rooted in struggles over the Constitution, gender relations, and attitudes to different races are increasingly playing out in elevated demonstrations of populism, violence and abuse. We see differences in the reading of history, not just between whites and blacks, but also in the ways in which the struggle against apartheid, the constitutional settlements and the TRC process is understood.

<sup>6</sup> See Mandela Initiative Synthesis Report 2018  
<sup>7</sup> See Mandela Initiative Synthesis Report 2018

This KDF includes the mobilisation around a sense of woundedness and resentment, as well as around ethnicity and culture. It includes fraught struggles for recognition, whether from Afrikaans language activists, black lesbians, Khoisan communities or would-be secessionists, as well as contests over affirmative action and how 'transformation' is legislated. The key questions and concerns explored with participants include 'the effects of an anti-black, unjust world' that have been inherited in the new South African society.

This speaks about the progress of reconciliatory journey in South Africa and how some young people are beginning to question the journey from apartheid to maturing democracy. Respondents' feelings of reconciliation were dependent on certain outcomes such as racial justice and genuine social and economic redress. A large number of respondents believed that the government had not done enough to address the challenge of what was described as "intergenerational" trauma.

### **We cannot agree on our past.**

There was widespread feeling among our participants that South Africans do not have enough of a shared understanding of our history, nor do they agree on who has (or has not) benefitted from the transition from apartheid to democracy. Every 'race' group appeared to have a case to make about why post-democratic South



Africa does not 'belong' to them, and about the mechanisms of exclusion that make them feel unheard. This was often coupled with narratives of resentment against those who were perceived to have benefitted unfairly. As one participant put it, the country is replete with 'silent non-agreements' ie there are underlying conflicts we do not speak of, so as not to 'upset' the transition. Indeed, as the compromise and fragility of the transition become more apparent, so too does the likelihood of its disruption.

Meanwhile, we have begun to wrestle with our **Constitution** and its ability to deliver justice, with emerging flashpoints around land, traditional leadership, sexual orientation, sex work, language and access to information. Some argued that these are the seeds of a more meaningful reconciliation in the longer term while others were less optimistic.

### **SILENT 'NON-AGREEMENTS'**

**As one participant put it, the country is replete with 'silent non-agreements': there are underlying conflicts we do not speak of, so as not to upset the transition. Indeed, as the compromise and fragility of the transition become more apparent, so too does the likelihood of its disruption.**

### **What would this disruption look like? Would it be good or bad?**

There are already moments of rupture in which questions of Resistance, Resentment and Reconciliation are taking centre stage: mobilisations around decoloniality, mother-tongue education, farm murders, land, institutional racism and so on. Even within these movements, there are often deep fissures along gender and generational lines.

## **KDF 3 Institutional and Leadership Capacity**

In the wake of the moral, ethical and human resource capability erosion experienced in the recent past, *Indlulamithi* participants identified *Institutional and Leadership Capacity* (state, private sector and civil society institutions) as a key determinant for the future of social cohesion. Leadership as expressed in all spheres

of South African society will shape the possibilities of social cohesion by 2030. This KDF manifests itself in the **strategic capacity of South Africa's leadership to appreciate the collective interest and work to realise it.** The ability to take a long-term view in decision-making, and the kind of ethics and values espoused and practised will be critical. In this context working towards a common vision, national unity and fostering a civic spirit in line with our Constitution will be key manifestations of this KDF.

State capacity has been systemically undermined by corruption and poor skills at critical levels. Many *Indlulamithi* participants worried about the weaknesses in our public service.

The looting of state-owned enterprises was also of particular concern. World Bank Development Indicators in 2017 suggested that South Africa's state capacity was declining at an accelerated rate. Meanwhile, the country has also been shaken by private sector theft and fraud. It will be important for the media and civil society to improve their capacity



to hold the state and private sector accountable as well as assist in the process of reconciliation.

The state's capacity would make a critical contribution to social cohesion as manifested in its ability to provide economic direction, embark on long-term planning and ensure effective social delivery, including the expansion of the social security system, improvements to the education, health and criminal justice systems, and the future of governance in state institutions.

Such capacity will also help South

Africa in determining its position in the arena of global relations.

The project also considered questions of what does it mean to have a people-centred state, economy and society broadly? What would a more peaceful, and more caring South Africa look like, and to what extent can there be a common vision for the future our country?

# THE WORLD IN 2030

**South Africa's future will play out in global and continental contexts which will shape and colour, constrain or expand our local choices. Of particular importance will be:**

- ① **Increasing levels of income and wealth inequality**, both between nations and within countries, including all the BRICS countries.
- ② **Environmental changes**, including increasingly severe shifts in global climate patterns, long-term temperature increases and environmental degradation. Climate change impacts on Africa – mostly causing drier and hotter conditions – need to be monitored carefully.
- ③ The **shift away from fossil fuels** and the ‘carbon economy’ and growing pressure for all countries to conform to lower carbon emissions standards.
- ④ The continuing **exponential advance of computer processing power** leading to rapid changes in machine learning/artificial intelligence. The intersection of this processing power with gigantic data sets derived from networked systems and meta-surveillance is changing consumer culture, government/citizen interfaces, the media industry, education, transport networks, and how people meet and form relationships. This ‘4<sup>th</sup> industrial revolution’ and the creation of cyber-physical systems hold great potential – and much peril – for developing countries such as South Africa.
- ⑤ Geo-political shifts to a **more multipolar world** as China’s economy – and military prowess – continues to grow. China will surpass the USA as the world’s biggest economy in late 2020s.
- ⑥ **A rise in authoritarian populist movements** in many democracies around the world, partly because both liberal and left-wing programmes have struggled to articulate coherent visions and win people over to their programmes.
- ⑦ Globalisation, and especially **offshoring of work and digital disruption**/4th industrial revolution processes, have put pressure on jobs and diminished trade unions’ power to shape political debates in many parts of the world.
- ⑧ The processes of globalisation and digital disruption have **created spaces for those mobilising around identities** (ethnic or national), or around ‘national security’. This is often driven by a ‘celebrification’ of society (exacerbated by rapid uptake of social media since 2007). It is impacting on democratic processes and sometimes even on election results.
- ⑨ **Rising consumer debt levels** – and the possibility of severe economic ‘shocks’ such as another global stock market crash – might undercut the projections for steady global economic growth in the medium term.
- ⑩ **Demographic growth** – and **stability of democracies** – across the African continent but particularly in South Africa’s neighbouring countries, will impact on South Africa for many years to come.

*We also need to be mindful of the following ‘cross cutting’ global ‘initial factors’ and ‘starting conditions’:*

• **MOBILE CONNECTIVITY:** South Africa has only just reached the ‘half way mark’ in 2018 in terms of the proportion of the population that is online. Even as we move past this 50% connectivity milestone – which is mostly via mobile phone-enabled connectivity – most users cannot yet afford to be online regularly because of the high costs of data in South Africa and the lack of sufficient free or cheap wi-fi connectivity. How might we change this?

• **DIGITAL OPPORTUNITY:** In a continent which averages only 30% total online connectivity (although more than 80% of Africa’s population had cell phone access in 2018), how will we navigate the various opportunities that a digital, online world offers? How might we quickly increase the number of people online in a meaningful way? And how might we make, receive and react to the other components of the 4<sup>th</sup> industrial revolution. Rapid prototyping and 3D on-demand fabrication, rapid advances in nano- and biotechnology, personalised medicine, and the imminent automation of many ‘routine task’ jobs?

• **LIVING MORE ONLINE LIVES:** Assuming greater and cheaper access to online technology, how might this

change the way we form and maintain relationships, connect with others – and find meaning in our lives?

#### **JOURNALISM AND THE PUBLIC SPHERE:**

How will digital online technology impact on the availability of news, the media industries and their ability to facilitate public discussions in the online public sphere, as printed newspapers become rarer and entire news eco-systems migrate online.

#### • **GLOBAL ECONOMIC GROWTH:**

In terms of global economic opportunities and headwinds, it is likely that slowing productivity growth – partly caused by aging populations in the developed world – and slower global economic growth will impact on the growth potential of African countries. This might be offset by productivity-enhancing technology that allows billions of connected people to work, shop, and connect with others online, and to ‘stream’ information and entertainment at low cost. Are we ready for the opportunities and risks that these shifts in the global economy offer, both with regard to possible changing terms of trade and in terms of the probable increased demand for commodities anticipated for the 2020s?

### • **THE ROAD TO NINE BILLION:**

Global population will increase by more than more than 1 billion people over the next 12 years (to reach about 8.6 billion in 2030). Because of Africa's high population growth rates, 1,7 billion of the world's population – or 20% – will be African in 2030. About 68 million of those, or 4% of the continental total, will be South African.

### • **THE CENTURY OF THE AFRICAN CHILD:**

By 2030 **one-third of all the children in the world will be African children**. The median age in developed countries in 2018 is 40: in Africa, it is 19.7 years of age. Will our continent give these children the opportunities they deserve? Some of these young Africans will want to access South Africa's education systems. Others will look south for jobs and homes. Will we welcome them?

### • **LAND HUNGER - AND THIRSTY LANDS:**

Growing populations, scarcity of water, and a slow rise in average daily temperatures, especially in central and southern Africa, may mean less available arable land. These environmental changes – and many other factors – are already propelling people into cities. Currently just 40% of the continent's population is in urban areas. But by 2030, almost half of Africa will be 'urbanised'.

### • **SLUMS AND MEGACITIES:**

Lagos and Kinshasa will both be 'megacities' of more than 20 million people by 2030, and Luanda, Dar es Salaam and Johannesburg will all be cities of more than 10 million – in just over a decade's time. Kibera, outside Nairobi, is the largest urban slum in Africa with a population of about 1 million. More super-sized informal urban areas are emerging, linked to or near mega-cities. Are we ready for the impacts of this?

• **CONTINENTAL TRADE:** South Africa, long the largest economy in Africa, could become Africa's second or third (or even fourth) largest economy by 2030. By then, South Africa is likely to be lagging about US\$100 billion behind Nigeria in terms of GDP per annum, and may also be eclipsed by Ethiopia and Egypt with their rapid current growth rates and vast demographic dividend. How might we benefit or be affected by the fast economic growth of our continental neighbours? Are we ready to expand trade northwards and focus more on assisting Africa overcome its huge infrastructure backlogs?

• **GLOBAL CONNECTIONS:** We also need to be mindful of the many ways South Africa's economy connects to global financial flows and larger global trade and finance ecosystems. How might our exchange rate fluctuate over the next 12 years? What might the Rand be worth in 2030 against key global and continental currencies? How might this impact on our overall balance of trade?

• **INVESTMENT GRADINGS:** What will South Africa's investment 'grading' be in the 2020s and in 2030 – and how might this affect how much foreign investment we attract, directly or indirectly, over the next 12 years?

• **INTEREST AND DEBT:** What will our debt levels be over the next 12 years, as proportion of our GDP? How will this influence our domestic interest rates and the abilities of South Africans to access capital and borrow money? How indebted will individual South Africans be compared to 2018's high levels of personal debt and low levels of household saving?

• **ARE WE ALL IN THIS TOGETHER?** How cohesive is South Africa? How much of a nation are we really? And how might this change over the next decade?

# THREE FUTURES FOR SOUTH AFRICA

Ultimately, there is only one future, once you look back at it. But looking forward, there are ranges of possibilities between sets of probabilities and unexpected shocks and surprises. These are three such sets of possibilities, three stories of how South Africa's future, as a cohesive and coherent nation, might unfold.

## iSbhujwa

### AN ENCLAVE BOURGEOIS NATION

Epitomising a loose-limbed, jumpy nation with a frenetic edge, iSbhujwa is a South Africa torn by deepening social divides, daily protests and cynical self-interest.

# Nayi le Walk

## A NATION IN STEP WITH ITSELF

In a precise sequence of steps, this scenario choreographs a vision of a South Africa where growing social cohesion, economic expansion, and a renewed spirit of constitutionalism get South Africa going.

# Gwara Gwara

## A FLOUNDERING FALSE DAWN

In a nation torn between immobility and restless energy, Gwara Gwara embodies a demoralised land of disorder and decay.



# iSbhujwa

## AN ENCLAVE BOURGEOIS NATION

Epitomising a loose-limbed, jumpy nation with a frenetic edge, iSbhujwa is a South Africa torn by deepening social divides, daily protests and cynical self-interest.

What happened, people wonder, to the egalitarian spirit of Ubuntu upon which we built our constitutional democracy in the early 1990s?

For many, a deep sense of historical injustice and resentment at their exclusion blows up into frequent public protests, which become even more of an everyday feature of South African life. In 2028 alone, South Africa experiences almost 3 000 serious protests. Initially peaceful strikes and ‘service delivery’ protests often become mini-uprisings: blockades of highways, barricading of streets, torching of trucks, firebombing of councillors’ homes and destruction of state property become routine in Isbhujwa South Africa.

For ordinary people, these seven or eight urban revolts per day are the most effective way in getting attention from the authorities, before the state and its security apparatus are called to focus their attention elsewhere. There is always a bigger fire, with more smoke. In 2022/3 and again in 2027/8, campuses are sites of fierce struggle, resulting in millions of Rand worth of damage to property and disrupting academic cycles and many students’ exams.

Everywhere, citizens retreat into their own enclaves of privilege or poverty. For the wealthy elite, their islands of voluntary isolation offer luxury, comfort, and a high degree of autonomy. They have private schools, private security, private golf courses,

private health facilities (with their own private ambulances), private justice mechanisms and private borehole water. Many of the more upmarket homes operate ‘off the grid’, running solar-powered battery packs and water-from-air distilling machines.

The widespread protests are not always economic at root: for many there is anger about the ‘incomplete transition’, including the persistent power of white privilege and male dominance. This provokes increasingly intense and often bitter conflicts. But the wealthy grow cold-hearted in their isolation, immune to the pain of those unable to access the lifestyle of suburbia.

### **Just after the weather, stay tuned for your daily protest report**

These protests are often completely ignored by better-off South Africans. Some in the middle class, feeling insecure and separated from both the really wealthy and those in the poorer classes that they have ‘left behind’, ignite protests of their own in the name of their narrow causes. There are regular ‘protest reports’ on radio stations after the news, weather and traffic reports. Some regard burgeoning protests as a positive affirmation of South Africa’s commitment to constitutionalism and freedom of association and speech.

The more cynical suggest that these demonstrations could be rebranded as tourist attractions – if only they could be more predictably scheduled.

But at root, by 2030, all the divisions witnessed in South Africa in 2018 have widened.

### **Our way - or the privatised highway**

In the early 2020s after several high-profile corruption trials, and despite some spectacular corporate bankruptcies, the private sector decides to reposition itself as the moral guardian of society. Linking up with some less overtly political unions, charismatic church movements and supported by elements within the ‘mainstream’ media, these wealthier South Africans shore up support for a range of private sector-centred solutions to society’s key problems.

Already by 2022 these forces are able to pressure government to drop much of its plan to extend universal health care via the NHI and instead get agreement to create more public-private partnerships to run the larger clinics and hospitals. They convince government to allow more private universities. Most of these are immediately successful despite their high fees and zero-protest policy.

This ‘market-led’ approach resonates with global investors – and often yields tangible results, at least for about 25% of the population.

The poor by contrast feel stuck in their poverty, stripped of hope and meaningful aspiration. Poverty and ill-health continue to exact a terrible

toll on families. For various reasons, including the falling popularity of marriage, the number of single parent families increases. Many unemployed men cannot make peace with their inability to provide materially for their children and absentee-father rates rise. The Free State's official rate of unemployment tops 40% in 2026, and for those in other poor areas, like the Northern Cape, more than a third of jobs seekers are unable to find a job – even once – throughout the 2020s. The numbers of social grants applied for and granted increase.

### Longing for land

Rural protests grow less patient with traditional and customary leadership that is often autocratic and demeaning. Feeling stuck at the back-end of every queue and disregarded by urban elites, and often still facing daily racism, rural

irate workers and landless peasants. When a famous Stellenbosch wine estate and 14 schools are reduced to ashes just before the 2029 election, global headlines scramble to describe 'a burning rainbow', or 'a nation in flames' and myriad other fire-drenched clichés, but in truth, everyone increasingly has 'no words to describe the situation'.

### The poor maak 'n plan

And yet, even as anger and acrimony grow, another famous South African mark of resilience comes to the fore, slightly adapted: 'the poor maak 'n plan'. Poorer South Africans become even more adept and adaptable as 'do-it-yourselfers', splicing electricity cables and looping power across long distances. Communal early child-care arrangements, such as street crèches, transform into informal schools.

Self-sufficiency increases, firstly as a survival mechanism, and then as part of the impetus for small-scale entrepreneurship. People realise that despite political party promises, jobs are not coming, at least not for most of the long-term unemployed. Inspired by the entrepreneurial spirit of many African migrants in South Africa's towns and cities (even if the different communities still don't always get along), people create small businesses in their own areas.

Savvy youngsters start to hustle more. Some provide for people's day-to-day health needs in innovative ways. High levels of social trauma, whether from the loss of a relative, witnessing violence or long legacies of apartheid violence, also mean that many people struggle with anxiety and depression. This makes them more vulnerable to chronic illness. As families must manage many illnesses and many different medications, there is a market for the services of pop-up licensed 'all-in-a-cart' pharmacies and entrepreneurs arranging home delivery of prescription chronic medications. These help reduce queuing times at clinics. Given the number of people living with HIV, and the growth of non-communicable diseases such as hypertension and diabetes, such businesses flourish in the 2020s.

The older unemployed provide repair services, and many unemployed people of all ages get some work in piecemeal cleaning and transport services,

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populations also rise up and cry out. Farms and crops are burned.

Even wealthy new black farmers, beneficiaries of the rapid allocation of 4 000 state-owned farms between 2019 and 2022, find themselves targeted by

Inexpensive compared to private schools, and often staffed by ex-state school teachers, some of these schools begin to outperform government primary schools, especially in maths and science.

connected to customers by apps and instant messaging as the effect of the 4th industrial revolution widens. Collective savings via stokvels and women's clubs provide at least some people access to capital.

There is a new 'can-do' spirit and even a precociousness that is unleashed, an awakening of national pride and a widespread shedding of any sense of inferiority or second-classness. Out of the schools and universities come more assertive generations avowing an African identity and embracing a Pan-African solidarity. Although more of a middle-class experience, it is embraced by younger and poorer South Africans in urban areas who find each other more and more on the sport fields, in city night clubs and in Uber ride-sharing schemes. The enclaves of wealth become non-racial in perspective and disposition – even as their walls rise higher and their isolation from the impoverished majority increases.

### Revving up start-ups

Overall, the large established businesses invest only as much as would allow them to make substantial profits in more monopolised sectors.

Government encourages smaller business through more targeted initiatives. Start-ups are supported by local development agencies and private sector incubators begin to function more effectively than in the 2010s. There is a focus on social innovation and many mentoring initiatives from the private sector start to pay off. This

allows many smaller companies to create jobs on a larger scale. More of a 'start-up' disposition takes root as the informal sector grows faster and connects better with the needs of the formal economy. This creates, over time, more than a million new jobs in the informal sector.

### Slow-growth - with or without charters

By comparison, the formal economy grows more slowly. Large-scale agriculture, after some expansion in 2019–2021, is beset with uncertainty about land. Smaller-scale farmers make some progress with substantial government aid in high potential areas, but larger scale agribusiness does not expand much in the 2020s. (Other African countries by contrast see huge investments in their agricultural sector.)

Mining production continues its mild recovery from the historic lows of 2016. A measure of policy certainty from a hard-fought Mining Charter sees more local and international investment. Although mechanisation and modernisation extend the working lives of many mines, the number of direct jobs created by the mining industry decreases to 350 000 by the mid-2020s.

Manganese, iron and chromium continue to do well as Asian economies require more and more steel and, while gold mining output stabilises in the early 2020s, the nation gets a collective chill down its spine when the total number of gold mining jobs drops below 100 000 for the first time in 2022. This, as so many lament, is less than a quarter of those employed in gold mining when South Africa's democracy dawned in 1994.

### Let there be light manufacturing

Trying to boost other sectors, the government creates a range of incentives to encourage various kinds of light manufacturing. Drawing on the savings made by bringing in a private sector partner for South African Airways (SAA) in 2022 – and other partial privatisations, provinces are encouraged to create manufacturing hubs and special export zones. These localised enterprise development areas provide better local linkages and clustering effects, but finding profitable niches is difficult.

### Despair of the NINJAS

Business process outsourcing and international call-centre operations also grow significantly – until these jobs begin to be replaced in the mid-2020s by automated AI 'chat bots' that eliminate jobs that are made up of many routine and repetitive tasks.

**Drawing on the savings made by bringing in a private sector partner for South African Airways (SAA) in 2022 – and other partial privatisations, provinces are encouraged to create manufacturing hubs and special export zones.**

Ultimately though, it is only the services sector that creates much by way of new jobs. By 2030, South Africa has more security guards per capita than any other nation. And by 2030, while the unemployment rate (20% on the narrow definition) is lower than at the start of the decade, it is still far too high for any country that aspires to build social cohesion. Particularly one where the median age of the population is still well under 30 years.

Between the 2019 election and 2030, South Africa has averaged just 2.2% growth, barely keeping the economy in line with population growth. Many NINJAs – those with No Income, No Jobs and Assets – slip into deeper despair, as they see yet another generation unable to climb out of poverty.

Joined by a growing ‘middle class’ of various levels of financial security (including the so-called JAMS who are ‘Just About Managing’ and usually only a pay cheque or two away from poverty), these roughly six to eight million wealthier South Africans become increasingly non-racial in their worldviews. They are social media-savvy and uber-connected, becoming more ‘bourgeois’ in their sensibilities and staying in touch with global fashion, food and tech trends.

### No truth or reconciliation

Partly because of sluggish economic growth, and persistently high levels of inequality, South Africans find it hard to meet across the borders of culture

and wealth. Younger generations confront unearned privilege more aggressively and there is some progress on reconfiguring gender roles and supporting families as core units of social cohesion. Levels of gender violence decline in some wealthier enclaves as active programmes seek to engage men to change as the global ‘me too’ movement impacts on South Africa’s multiple patriarchies, pushed by new women’s formations.

Government and many private projects seek to foster ‘reconciliation’, but this turns out to be mostly hot air. In the poorer areas, people just don’t see the value of ‘encounters’ that churches, temples, mosques and shuls try to organise, despite government funding for processes designed to build a new spirit of reconciliation and redress. The cry is for jobs and resources, and a more level economic playing field.

There was never a ‘new TRC’, as some clamoured for. People did not seem to want to deal with too many new truths – or any truths at all.

But at least a spirit of constitutionality survives despite regular acts of ‘insurrectionary citizenship’ in the 2020s. It is not unusual for communities to barricade highways and stone police one day, and engage senior council and seek urgent interdicts the

next day. Courts remain independent and are often the first resort of those contesting power inside and outside political parties.

The SANDF and the police also remain firmly under civil control and direction, and the armed forces provide a measure of stability as governing coalitions come and go.

### Shifting sands

A divided union movement, unable to grow its numbers significantly in the face of new forms of casualisation and the technology-based atomisation of work, tries to push back and create pressure for a more effective state rollout of resources and a better distribution of wealth. Having played an important role in curbing and exposing corporate excesses and corruption in the state in the 2010s, many in the union movement seek new ways to engage with more political struggles, stabilise institutions and grow their membership.

Despite this, COSATU finds its role diminished as a reconfigured tripartite alliance fails to repair a decade of damage. Unable to convince its restless membership, and with cadres not fully satisfied with occasional government positions offered by the ANC, the SACP experiments with ‘going it alone’ in the 2026 local government elections. To the surprise of many, it attains some 5% of the vote. Fractious debate ensues on how to approach the 2029 elections, especially in light of some violent incidents between ANC and SACP



members in the 2026 local government elections.

Newer unions and federations battle to consolidate their impact and influence and work out the right balance between shop floor effectiveness and their ability to shape the political climate and influence policy choices on the health system and educational reforms. Much of what had been a constructive ‘pressure from the left’ increasingly has little effect as the growing ‘gig-economy’, steep deindustrialisation and the widespread informalisation of work continue.

At the same time, a party formed in 2019 to campaign against corruption trials (but claiming to pursue radical economic transformation) makes little impact at national level, but does cut a few percentages from the ANC in KwaZulu-Natal. This party eventually allies with an IFP that has made small gains in the province.

Urban and rural divides deepen, as drought and a lack of support for rural development thrusts ever more people off the land. Traditional leaders in many provinces make a play for greater power and resources, aware of their ability to create large and more compliant ‘voter’ blocks than the urban areas.

After a few relatively stable years in the early 2020s, in the lead up to the 2022 ANC elective conference and the 2024 national elections, the ANC finds itself unable to overcome the



disruptive dynamic of factionalism.

The party splits along lines that reflect the polarisations of the NASREC conference of December 2017, but with more provincially based fault lines coming to the fore.

The ANC is not alone in its internal battles: all the major political parties split in the 2020s over issues of both style and substance. New political formations emerge and grab headlines, often to fade quickly or be absorbed by larger entities.

In this time of volatility, a resurgent alliance of opposition parties – more seasoned, better funded and more tech-savvy than the ruling party – forces the ANC into coalitions at both national and provincial levels in 2024.

### **Women fight back**

As political parties fragment, there is a rise of the politics of street and the emergence of both special interest and broader alliance movements focused on a wide variety of issues. Women, tired of the chauvinistic patriarchy that cuts across race and ethnicity, and often better educated than their partners or ex-partners, fight back against the violence and doublespeak. The war against women must end, they insist, as they create and sometimes violently enforce ever-widening zones of safety for themselves and their children.

Safe houses and better support from social services also make a difference and start to lower South Africa’s rates of domestic and sexual violence. LGBTIQ+ communities push back

against hostile environments many must contend with, creating some safer spaces on university and TVET college campuses and some urban schools.

The influx of refugees, work-seekers and migrants from SADC countries and beyond puts a strain on social systems, particularly in Gauteng. Both schools and health facilities struggle to keep up with demand from internal relocation from other provinces and inward migration from the continent.

The criminal justice system battles with rising crime and the increased targeting of South Africa by global crime networks. South Africa is seen as a useful base by many criminals, due to ineffective policing and overwhelmed prosecuting authorities, and because it provides convenient access into Africa for drug, human trafficking and cybercrime syndicates.

Underdevelopment of agriculture and a more generalised lack of investment and educational opportunities in rural provinces accelerate urbanisation and migration. By 2030, 70% are living in urban areas – and nearly one in every three South Africans is living in Gauteng, which along with Western Cape and KwaZulu-Natal strains to keep up with accelerating inward migration from the rest of South Africa and the rapid growth of migration from African countries.

Even though these urban areas provide almost all of South Africa's economic growth and jobs in the 2020s, poverty

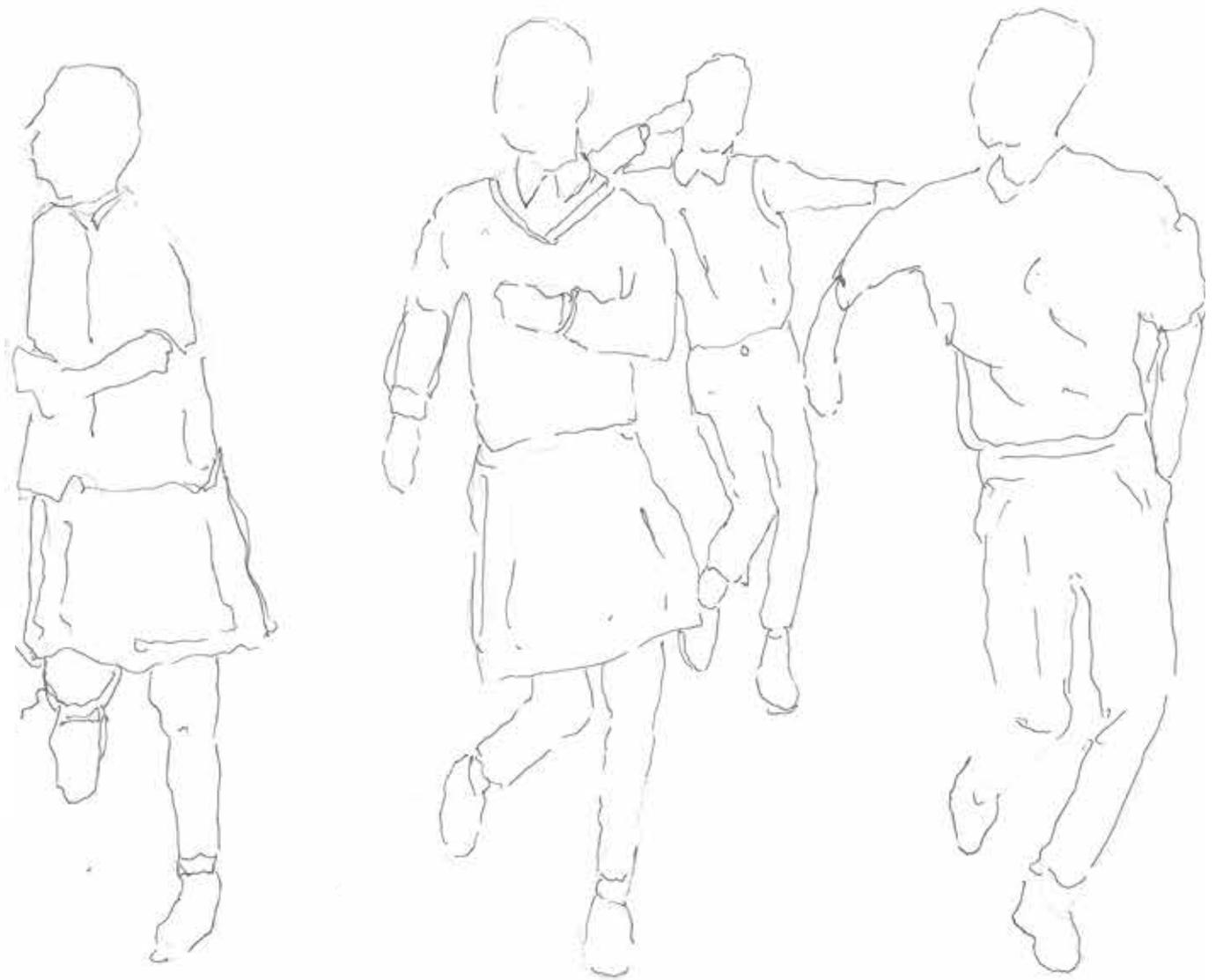
and inequality escalate, and they see surges of social protest, sparked by their inability to provide necessary services for populations attracted by the promise of prosperity.

After rounds and rounds of fruitless conversations and summits, many take the view that social reform and the quest for greater levels of social cohesion and nation-building are tasks best left to others. The country has exhausted its citizens. Political party, trade union and church membership levels plummet. People just don't seem to want to be involved.

“Send someone else” becomes the cynical refrain of the day.

## KEY FEATURES AND SYNOPSIS

- **A rapid escalation of social protest**
- **Growing separation of poorer and mostly black South Africans, and a wealthier and increasingly cross-racial middle class**
- **Implementation of market-lead interventions in education, health, services of state owned enterprises – with mixed results**
- **Faster land reform is implemented, but under-investment in agriculture causes longer-term declines in food production and food security**
- **Some improvements in schools and overall educational performance**
- **Further erosion of trust in key societal institutions, even as many improve their capacity and competence**
- **Moderate increase in foreign direct investment and higher levels of domestic capital formation**
- **Slow but relentless currency depreciation and increased sovereign debt risk**
- **Social grant recipients numbers increase substantially**
- **GDP growth averages 2.2% to 2030**
- **Unemployment reduced to around 22%, at the narrow definition**
- **South Africans feel less and less part of one nation, united by a common national vision**



# Nayi le Walk

## A NATION IN STEP WITH ITSELF

In a precise sequence of steps, this scenario choreographs a vision of a South Africa where growing social cohesion, economic expansion, and a renewed spirit of constitutionalism gets South Africa going.

For most South Africans, still grappling with the generational burdens of joblessness, landlessness and inequality, the harsh everyday reality is that life is better . . . for some.

The 2019 elections, although fiercely contested, are mostly peaceful and they shift the mood of the nation. The ANC retains power with a reduced majority, and for some this is enough to unleash a wave of optimism. Foreign investors, entrepreneurs, NGOs and small businesses seize the initiative to invest in South African infrastructure, people and enterprises.

The opposition, although more diffuse and confrontational, remains committed to constitutionality and the rule of law, working with re-configured Chapter 9 institutions to ensure more transparency and better governance.

### Concords and compacts

A national concord of social cohesion is initiated by civil society and government, which seeds new programmes to connect people across divisions of race, gender, ethnicity, class and religion. This increasingly takes place at grassroots levels and in schools, universities and TVET colleges, but also at the level of spatial planning as substantial resources are put into overcoming the physical legacy of apartheid urban planning.

This includes strong incentives for developers to create viable but affordable ‘blended suburbs’ or

‘blurbs’. There is further expansion of rapid urban transport, including the full Gautrain roll-out, the eThekweni Integrated Rapid Public Transport Network (IRPTN) and Cape Town’s light rail and sky rail networks. All are operational by 2030.

Social housing schemes, developed either through refashioning urban buildings or building on newly title-deeded land, help to create a greater sense of integration in many urban areas.

### Slow-getters become go-getters

The role of the arts and culture in providing a platform for youthful artistic expression – and in animating this sense of national belonging – is recognised, resulting in more substantial commercial and apolitical public funding of the sector.

In the early 2020s, closer cooperation between the Department of Basic Education and the Department of Arts and Culture produces not just better education, but a revived Creative Industries Cluster much more attuned to the needs and aspirations of the 50% of South Africans who are younger than 27.

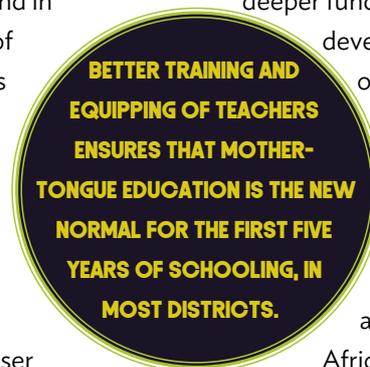
The biggest improvements come from a steady focus on equipping early learning centres and primary schools with resources, additional

staff and a move away from a ‘day care’ disposition. Initiatives to involve families more in their children’s education are launched through a number of large pilot projects which, when successful, are rolled out in many parts of the country. Better training and equipping of teachers ensures that mother-tongue education is the ‘new normal’ for the first five years of schooling, in most districts. Shifting to English-language teaching is more carefully managed.

### Every child counts

More pupils start to benefit from the radical refocus of efforts on the first 1 000 days of life, the expansion and deeper funding of early childhood development and the shift of educational funding priorities to primary schools. Realising that ‘playing catch-up’ from Grade 3 or Grade 4 was perpetually self-defeating and a root cause of South Africa’s educational crisis at higher levels, the nation puts a great deal of energy into transforming the first six years of schooling.

At all levels and in many schools, teachers are retrained and incentivised via time-off and scholarships to get postgraduate qualifications. Additional teachers, including some from overseas, are drafted in to help at some poorly performing schools. As teachers’ knowledge and teaching skills improve, so does their confidence.



Because of the shift to more years of mother-tongue instruction, pupils are able to enter high school with greater confidence in their maths, science and reading and writing skills.

All these factors, combined with national reading clubs and after-school maths clubs (using innovative new teaching methods and app-based technologies), finally pull South Africa off the bottom of the global reading and mathematics proficiency tables.

### Learning through Ubuntu

By 2030, efforts to devote more teaching and time to the promotion and understanding of civic values – including the exploration of nuanced and layered conceptions of Ubuntu and other communitarian ethics – start to pay off. These classes emphasise and imagine what social commitment looks and feels like – and allow pupils to delve deeply into understanding colonialism and apartheid, and the myths of racial and gender superiority that South Africa was historically built on.

From early childhood development through to university, students grapple with understanding why sexism, racism and xenophobia persist – and explore the ‘system behind the system’ that encourages these divisions of power and privilege.

By the late 2020s, South Africa’s TVET colleges that battled with very low completion rates in the late 2010s are

thoroughly overhauled. The best of them begin to produce the cadre of fitters, turners, mechanics, carpenters, bricklayers, plumbers, and boilermakers that South Africa needs for the infrastructure and building boom of the mid 2020s.

The country benefits from expanded access to higher education. What started off as a seemingly cynical act just before the ANC’s 2017 NASREC Conference receives praise within South Africa and globally, as it plays a substantial role in skilling more young people and reducing inequality.

### Active pathways

Young people are increasingly entrepreneurial and are keen to pursue livelihoods independent of the government and big corporations. Innovative solutions to upskilling South



Africans for growing demand in the digital and services economy unlock more human capital – particularly among the youth.

In the 2020s, more active management of pathways out of the schooling system and into the world of work have enabled many so-called NEETs (Not in Education, Employment or Training) to transition into the economy. Digital

technology transforms the world of work in the 2020s globally and locally. In order to have sustainable livelihoods young people come to rely more on self-employment in community-level services and micro-enterprise.

To prepare young South Africa better for this, schools focus more on self-reliance and fostering a digitally savvy generation than previously. Greater emphasis on financial literacy and understanding enterprise development helps grow self-sustaining and highly localised businesses.

Those who might have been NEETs, now see opportunities more equitably shared, and this creates positive ‘network effects’ across households and communities.

### From boys to men

Inspired by growing access to socio-economic opportunities, young boys and young men learn better how to develop confidence to express emotions and how to value and respect girls’ and women’s bodies and lives.

The 2020s are transformational for gender relations in South Africa, as a growing economy helps alleviate poverty and empower more women and men. Companies, government departments and universities help change conditions in the workplace to facilitate women’s participation in civic life. More creches and day-centres are opened. Younger, more militant feminists transform the moribund

ANC Women's League, the ANC itself and other political parties, as well as the leadership of many trade unions and NGOs.

Looking back to 2018, when barely 10% of South African CEOs and five percent of university vice-chancellors were women, South Africa sees progress in 2030 when 30% of all CEOs and half of university vice-chancellors are women.

Campaigns to empower women at the grassroots, often led by women's community organisations, show increasing success. Campaigns to equip men to participate more meaningfully in a rapidly changing world and to reduce levels of domestic violence, teen-pregnancies and intergenerational 'blessing' slowly turn the tide. South Africans involve themselves in wide-ranging campaigns that expose the systemic connections between patriarchy, economic exploitation, ethnic chauvinism and violence against women, children and LGBTQIA+ people.

The 2020s also see government implementing the NHI in the face of steep opposition by those with some access to private medical care, including many in government. Growth-induced extra-tax revenues allow national and regional NHI implementation teams to make good progress, as private sector expertise is drawn upon to develop the backend health informatics systems, allocate health professionals, prevent fraud and corruption, reduce waiting lists and

improve service levels.

The under-utilisation of capacity in the private system is used to reduce the dire lack of capacity in the public health system and new economies of scale and scope reduce South Africa's infant and maternal mortality rates over the course of a decade.

Five years are added to average life expectancy of both women and men by 2030.

### Reconfiguring the economy

Following intense debate and consultation, a new land bill is tabled, debated at great length and passed in Parliament in 2020. This not only allows for accelerated land redistribution, but also provides far better support for new landowners in rural areas.

Demands for urban land are met with quicker land release programmes, and a more nuanced response to the influx of people into South Africa's main cities. The release of state-owned land parcels and some expropriation of land (where needed) create more connected and secure urban communities and give more people a stake in the urban property ecosystem. All 4 000 farms owned by the state are transferred to new owners – individuals and community trusts – that receive support to use the land productively.

Agricultural linkages – between large and small farmers and local and international opportunities – are

improved. South Africa embarks on a determined path to add value to its natural bounty. Agro-processing of fruit, wood and maize is substantially expanded and the state's Mineral Beneficiation Action Plan (MBAP) is slowly brought to fruition.

### Africa rising

To South Africa's great benefit and partly because of its patient behind-the-scenes diplomacy, many countries in Africa boom beyond expectation. Angola's new government reduces corruption and spreads its oil wealth beyond just 20 or 30 connected families. Zimbabwe's successful election in 2018 and the lifting of decade-old sanctions sees its economy rebound at astonishing speed – growing at seven percent in 2021 alone. Additional trade and cross-border industrial clusters across the Limpopo are opened up. Zimbabwe becomes South Africa's leading African trading partner again, as had been the case until 2000.

This alone adds 0.4% a year to South Africa's GDP from 2022 onwards.

Racked by decades of civil war and conflict, in the mid-2020s the DRC slowly recovers stability and its vast mineral wealth is better unlocked. Even more distant economic booms, in Tanzania, Rwanda and the post-Museveni Uganda, blow fresh winds into South Africa's economic sails. Kenya, already growing consistently at 5% per year by 2019, ramps up

further as it becomes a technology and innovation hub with clear and certain policies that attract investment.

New e-visa regimes facilitate international and inter-regional tourism. More visible policing in tourist areas as well as special tourism crimes courts, working at night and weekends as in 2010, help protect visitors to South Africa. Tourism to Africa explodes as does tourism to South Africa from the continent.

South Africa's closer ties to East African Community member states, especially Uganda, Tanzania, Kenya and Rwanda, create a corridor of prosperity reaching into Ethiopia. Learning from Mali's innovations in low-cost irrigation and inspired by

**Brexit boomerangs**

Unexpectedly, the fiasco of Brexit gives the South African economy a welcome boost from 2021 onwards, as an isolated Britain refocuses its energy on the Commonwealth and South Africa in particular. King Charles III's visit to South Africa, Botswana and Zimbabwe in 2027 is followed by another round of large-scale investment. This spurs competition with Germany for investments into South Africa and both are closely shadowed by Chinese mega-deals in mining and agriculture.



Brazil/South Africa (IBSA) trilateral compact, forging new ties between three of the most democratic countries in the world, all with proud histories of solidarity and trade.

Locally 'focus' becomes a mantra of those trying to guide the South African economy. Specific projects to jump-start and support private-sector led growth in agriculture, tourism, mining and light manufacturing are implemented. Investment incentives and state support for light manufacturing initiatives and improved rural development based on the National Development Plan, help the economy grow in ways that employ and uplift a greater number of people.

New start-up funding schemes allow small businesses to more easily access capital, and more of the Public Investment Corporation's vast funds are channelled into medium-sized enterprises. Across the value chain, the mining sector is re-energised by an unpopular, but at least certain and predictable, Mining Charter which is signed in early 2019.

**Fuelling growth**

As rapid uptake of electric vehicles takes off in the 2020s, South Africa forges ahead with fuel cell technology in partnership with China, South Korea and the US state of California. By 2030 in Africa, fuel cell cars, buses and trucks and electricity generation are starting to catch up with electric

**SOCIAL COHESION**  
 Social cohesion refers to the levels of integration and inclusion in communities and in society at large. It often reflects various measures of participation or non-involvement in social organisations or institutions. It is shaped by disparities in income and wealth as well as by levels of interpersonal and intergroup trust. Crime rates and frequencies of violence, as well as overall wellbeing and the general health of populations are often mirrored in measures of social cohesion. It is often encapsulated via expressions of common values and expressed in a sense of nationhood and shared ethics and ideals.

Kenya's methods of building tech innovation hubs, South Africa becomes part of an Africa-rising narrative.

South African companies are able to participate in a substantial component of a US\$2-trillion scheme to create or refurbish African infrastructure. A South African consortium paves a fifth of Nigeria's dirt roads in the 2020s.

Brazil becomes a more eager trade and investment partner as it, too, tries to grow its way out of poverty and advance development. The two countries' chemical, pharmaceutical, sugar and media industries initiate a variety of joint ventures which entrench Brazil as our largest Latin trading partner. South-South trade is further strengthened as the post-2019 government re-energises the India/

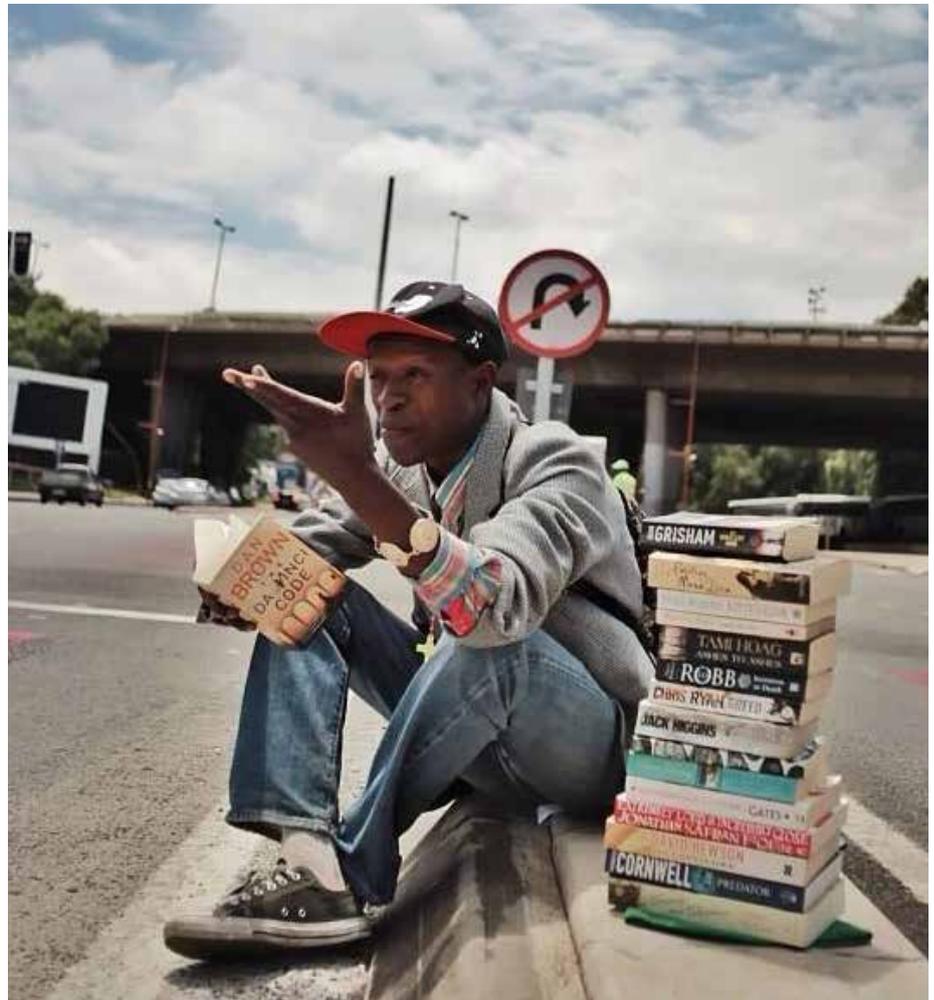
vehicles and solar power generation, although it is widely recognised that it will take another decade or so for the fuel cell optimists to feel justified. After years of disinterest, Eskom becomes a key participant in fuel cell off-grid generation as it partners with more private sector players in wind, solar and energy-storage solutions. In 2025 Eskom announces a partnership with a Tesla-linked company to build a Gigafactory in Limpopo and this soon begins supplying energy-storage batteries to supply the rest of Africa and the Middle East.

### Getting onto the belt

South Africa works hard to make its BRICS relationship work, twisting the arm of China to allow it and other African countries to join 'One Belt, One Road' initiatives and better integrate the region into China's growing global value chains. Both India and Brazil become more engaged and committed partners in developing the 'Global South' economically and in political terms. South Africa's 2019/20 seat on the UN Security Council allows the country to reaffirm its commitment to a foreign policy stance based on human-rights, alignment with the Global South and Afro-centrism.

### Growing pains

The trade union movement post 2020 was made up of three distinct strands. A strong left critique comes from the likes of SAFTU and puts pressure on the government to consider populist



steps while following centrist economic policies. COSATU, which is largely dependent on its core public sector unions, continues to hold onto its alliance with the ANC. Independent trade unions not affiliated to SAFTU and COSATU focus on under-organised workers and make many gains.

This fractured but determined trade union movement, including more militant new unions and federations, focuses more on pro-poor growth strategies, reassembled from the early RDP macro-planning initiatives of the early 1990s. These are inserted into the

national political discourse and often into government policy and planning.

Building on this growing institutional capacity, better-performing education and some success in 'working through' the complex issues of structural racism, discrimination and exclusion, the economy grows at 3.5% per annum in 2022 and 2023. Then, helped on by the lucky combination of Africa's 'decade', China's reviving economy, increased domestic and foreign investment, and a near doubling of South-South Africa trade, the country achieves an average growth rate for the decade of 4.5%.

This keeps pace with the 2020s average for emerging markets, at 4.8%, and is well above the global growth average of 3.4% for the decade.

**Protest and alienation**

Despite rapid economic gains and sharp falls in unemployment, South Africa’s high levels of inequality decrease at a frustratingly slow pace.



Criminal syndicates, some foreign and some local, forge deep alliances with each other – while also forging other people’s ID books and bank accounts. Cybercrime and bank fraud become endemic as do the operations of sophisticated human trafficking and smuggling syndicates. Kidnapping, particularly of foreign nationals, is a growing challenge for a still under-resourced police force.

As the 2020s roll on, there are further overhauls of the police and justice system. More stringent vetting and training of law enforcers helps to contain crime and ensure that protests, while frequent, militant and even disruptive, are much less violent.

**Lining up and falling in**

The SANDF is able to run a popular youth ‘national service’ programme that sees hundreds of thousands of young people learn valuable skills and

get a clearer sense of the career paths they might want to pursue.

The police too are transformed by a doubling of initial training time, new digital technologies supplied by honest emerging businesses (and not vendors tied to a corrupt past) and more rigorous recruiting.

Both the SANDF and the police are able to grow in the public’s esteem: the SANDF for its youth scheme and brave peace-keeping missions and the SAPS for increasing detection rates, pro-active policing and, especially from 2024, sharply declining crime rates

**A government that flies economy class**

In government, clarity of task and mission, clearer and more measurable outputs based on the revised and updated NDP plans and targets, and meaningful staff development raise morale and productivity.

Although hard to imagine after the prolonged wage negotiations and industrial action of 2021/22, as workers demanded a bigger share of the growing pie, from late 2022 performance management and incentive alignments see public officials, from mayors to headmasters and from directors-general to police officers and health workers, raise their game – or get booted out of the system.

Cross-sector coordination, silo-breaching and improved clustering of departments help government coordinate better. This is assisted by the establishment of the Centre of Governance – comprising the Presidency, the DPSA, DPME and National Treasury – which ensures closer alignment between the highest office in the land and the rest of government.

The unsettled labour relations environment also manifests in the private sector, with intense campaigns against the stubbornly high levels of inequality. In the build-up to the 2024 elections, the ANC insists on a law for the calculation and publication of income differentials within individual companies and state-owned enterprises – the gap between the lowest and highest paid employee. This triggers vigorous debate on what is ethical and acceptable. While salary ceilings laws are not introduced, the prospect of ‘naming and shaming’ encourages some improvements

**A time of trials**

Particularly at the level of central government and at key state-owned enterprises (and less so at a provincial and regional level), good governance is prioritised, and clean audits become more the norm. The unfairly labelled ‘show-trials’ of 2019/20 see previously high-ranking officials successfully prosecuted – alongside their patrons from the private sector – and this makes a huge impression on the public.

The process is assisted by a plea-bargain campaign that results in some commuted jail time and reduced punishments, provided undertakings are given to ‘pay-back-the-money’. In some cases amnesty is granted to certain leading families for their cooperation, which creates a great deal of controversy and anger among sections of society and court challenges are initiated by opposition parties to challenge the amnesties.

Faced with possible embarrassment in the Constitutional Court, the President relents but soon thereafter grants some high-profile convicts pardon, in the name of national security and social stability.

### A better public service

In the public service, more rigorous selection, longer entry-level training in administration and a four-year ‘promotion moratorium’ imposed on any officials implicated in non-compliant audit findings (which survives many court challenges and public-sector go-slows) become a motivating norm for those who take the service part of public service seriously. The legitimacy of the public service improves as does respect for institutions that regain and proclaim their ability to do their jobs.

This allows the state to implement unpopular decisions, although the call to eliminate TV licences is widely welcomed. In addition, and because of a determination to jump more

firmly into the digital era, government works with private telecommunication companies to ensure internet connectivity via fibre spreads across the nation, including previously neglected townships and rural areas. Social media become a preeminent source of news and information for many, while at the same time enhancing the ability of ordinary South Africans to make their voices heard.

Even as fake news abounds, a space is created which allows the SABC to recover its credibility as a source of useful and verified news, in the process expanding its digital platforms and channels to accommodate more languages and much more local news. Although it does retain a respectable listenership and viewership, this however does not stem its decline as more people rely on emergent cheap pay-TV channels, internet live-streaming services and a proliferation of channels on digital platforms.

### FIBRE AND FAST WIFI

**Because of a determination to jump more firmly into the digital era, government works with private telecommunication companies to ensure internet connectivity via fibre spread across the nation, including previously neglected townships and rural areas.**

### Viva the Constitution

In the era of state capture, the Constitution may have been viewed by some as an obstacle to self-enrichment and freedom from the prying eyes

of investigative journalism. But from 2019 onwards, in the slipstream of the credible election with a high turnout, the state and civil society are able to push back against these ‘constitutional delinquents’, reaffirming the supreme law of the land and promoting a national sense of pride in the power of constitutionalism.

A measure of the state’s ability to govern effectively is its increasing ability to respond proactively in addressing the conflicts and grievances that feed into protest and to firmly discourage protest-related violence.

### Hamba kahle, freedom fighters

The last of the liberation struggle stalwarts retire or pass on. A younger generation, born into the age of democracy and the internet, start governing in politics and leading in business. They are connected to the world and its infinite possibilities. More

South Africans get involved and stay involved in helping to create a better-functioning society. Membership of political parties and civic organisations, growing in the late 2010s, swells further in the 2020s. Spurred on by a sense



of momentum and some success in reducing crime rates, South Africans in the diaspora slowly return, repatriating capital and skills.

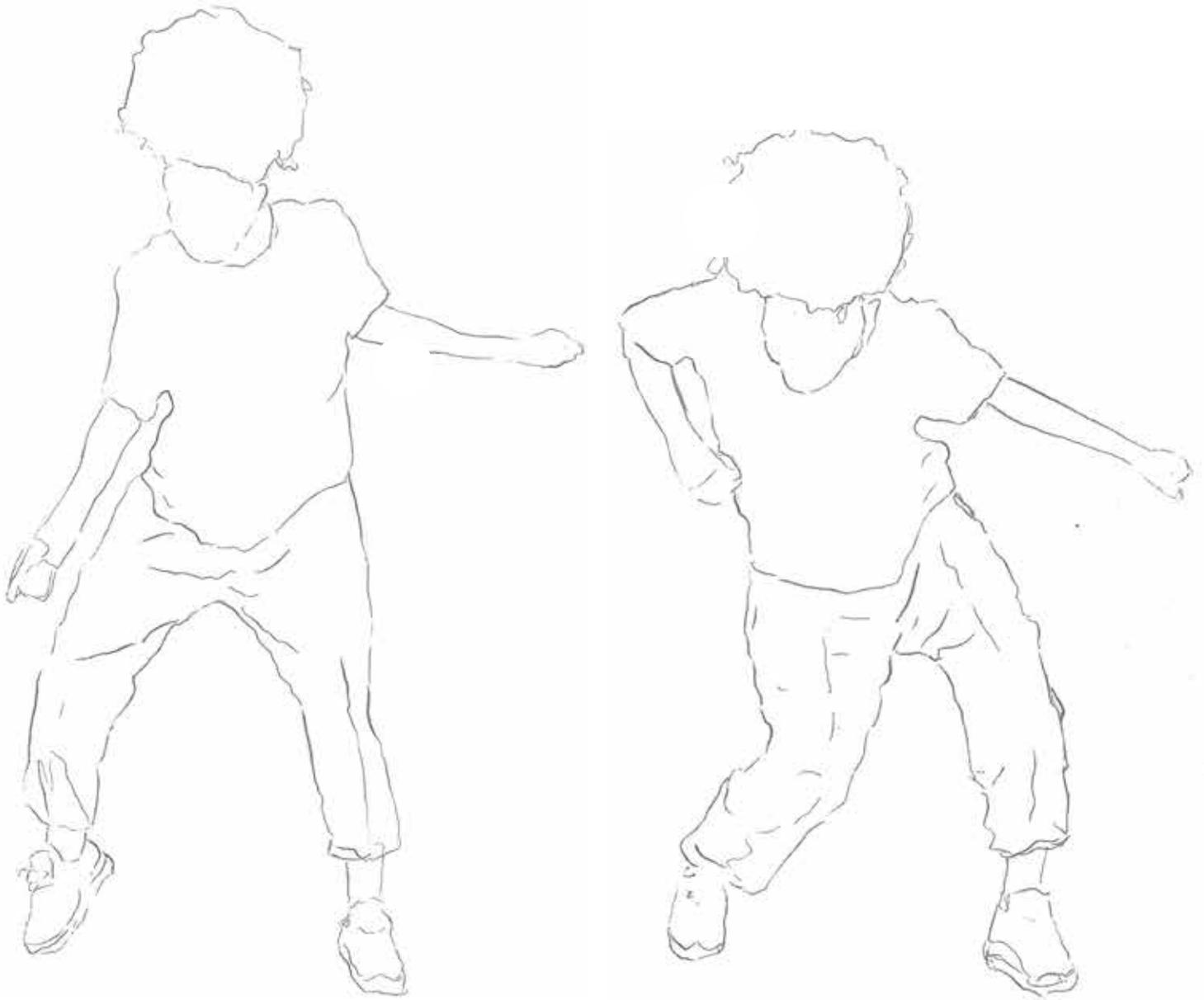
more tangible, not only just through the actions of government, but through the power of people taking charge of their own destinies.

### **The path to a promise nearly fulfilled**

In 2030, South Africans will be able to look back on 35 years of democracy with some satisfaction. While the process will have been messy and contested, and while the NDP targets on economic growth were not fully achieved, economic growth in the 2020s was far higher than expected – and jobs outpaced population growth. South Africans are more in sync with each other as they see a more coordinated state deliver better services. South Africa has become a place where popular uprisings have given way to the rising up of the people. Promises of a better life for all become

## KEY FEATURES AND SYNOPSIS

- Early childhood development programmes are expanded and more resources devoted to first six years of education
- Increased promotion of civic values and conceptions of Ubuntu and other communitarian ethics – start to pay off.
- TVET colleges are overhauled to produce many more artisans and university education is made more affordable
- Young people are increasingly entrepreneurial and – keen to pursue livelihoods independent of the government and big corporations
- Various social compacts, civil society initiatives and new programmes connect people and social and political processes
- More social housing and multi-income ‘blended’ suburbs are developed and rapid urban transport systems are expanded
- National health insurance is implemented he face of steep opposition by those with some access to private medical care
- The country recalibrates its multilateral alliances to achieve a better balance between BRICS and traditional growth partners
- Intra-African trade increases as the economies of our close neighbours improve at more rapid rates than ours
- Prosecutions are more successful and the sense of impunity in South Africa decreases
- Better recruiting, training and support create a more capable and productive public service and public trust in key societal institutions grows
- There is higher domestic economic confidence and investment
- South Africa is upgraded by global credit rating agencies as foreign investment levels improve
- Faster urban and rural land redistribution and better support for emerging farmers boost agricultural production, food security and urban integration
- From 2020, economic growth is more solid and predictable: GDP growth averages 4.5% to 2030
- The unemployment rate is reduced by about a percentage point a year between 2020 and 2030, to reach 16% by 2030



# Gwara Gwara

## THE UPS AND DOWNS OF A FALSE DAWN

In a nation torn between immobility and restless energy, Gwara Gwara embodies a demoralised land of disorder and decay.

Despite the state's best efforts before and after the 2019 elections, many records have been erased, and many tracks are long covered. Even in the most severe and clear-cut cases, the prosecuting authorities, often themselves deeply compromised, are unable to mount and sustain legal action. In a much remarked-upon irony, it became clear that the more corrupt and enriched ex-officials became, the better the legal defences they could now afford!

### Lawfare and disorder

To growing rage, every charge brought is contested and every legal delaying tactic employed. "Lawfare" is waged with a retinue of fancy, expensive lawyers, all expert at stringing out cases. Funding mysteriously appears from distant bank accounts seemingly set up for just such legal attrition. Few trials run to their conclusion, and even fewer of the corrupt are convicted in courts of law.

In the court of public opinion, even those hardened by years of media exposure are shocked when it is revealed just how deeply even the forces of law and order have been captured and corrupted.

From small-town metros to top echelons of the police, corruption runs deep, enabling transnational gangs to operate with increasing impunity. As the police sinks, so do the fortunes of the nation.

### Leeches of the fiscus

SAA's turnaround strategy does not turn anything, as South Africans are amazed at the airline's uncanny ability to bleed billions of Rand from the fiscus.

Government will not be moved on even minimal private equity injection as unions – already facing loss of membership in the private sector – threaten to make South Africa ungovernable if large-scale privatisations or the liquidation of loss-making assets happen. An unexplained fire destroys an SAA plane on the ground at George airport, underlying the depth of opposition to the closure or sale of any of the state's assets.

By 2025, South Africa has spent a further R50bn keeping SAA, Mango and SA Express going.

Other large SOEs, particularly ESKOM, continue to leech on the limited reserves of the fiscus well into the 2020s.

The knock-on effect of this, as well as the rapid increased costs of government employee salaries, a strong uptick in social grant registrations and expanded funding for higher education hurts South Africa's balance sheet and balance of payments. South Africa has to borrow much more in the run up to the 2024 election as private sector confidence and desire to invest for the longer-term evaporate.

### Calling the IMF

By 2027, South Africa's financial situation is so dire that an IMF loan is sought and granted. Not since the US\$850m loan in 1993 under the De Klerk government has South Africa had to involve the IMF in country affairs. Other creditors had become nervous of the new coalition's stability and South Africa's ability to recover from the 'crash of 2026', one of the worst financial meltdowns in global history. Loans are called in and the IMF stands ready to help, albeit with strict conditions for structural adjustment more stringent than some of the constraints government had initially proposed which were resisted by many unions and the left-leaning groupings.

The crash hits other African economies, with further negative knock-on effect on South Africa.

### Absolutely no consensus

A sense of impunity and failed prosecutions degrade the ANC's standing with many in the middle and aspiring classes; and this trend envelopes the poor in both urban and rural areas. Perceptions of the ruling party's commitment to clean government and effective service delivery continue to diminish.

The consciousness of unfairness and rage grows, as does people's dismay at their ongoing poverty. As mining jobs decline, many rural areas face

new levels of poverty, despite some improvements in land distribution and support for local economic development.

There are long negotiations about forming a government of national unity even though the ANC’s narrow absolute majority does not necessitate such coalitions. The widespread corruption of the 2010s is disrupted but not defeated, and many of those complicit seek comebacks via ANC structures using funds externalised for precisely such possibilities. The formation of the African Radical Economic Transformation Congress using the ANC’s regalia with impunity wins significant rural votes, and obtains another swath of election crosses because of its deliberate juxtaposition with the ANC in name and logo.

**“Let someone else have a try!”**

There had been attempts at dealing with corruption, but the forces opposed to this steadily but surely gain ground within the ANC and, starting with the provinces, by the 2022 Conference, they have the upper hand.

Despite weakness in opposition parties, the 2019 election does not give the ruling party the mandate they wanted, and Gauteng and North West provinces attain less than 50%.

By the 2024 election, fragmented by infighting and weakened by the emergence of provincial factions unwilling to toe any national line, both

the ANC and other political parties, new and established, face an angry electorate. After months of variations of the new rallying cry, ‘let someone else have a try’, the ANC is forced to concede power to a fractious post-2024 alliance of opposition parties in the lowest voter turn-out election in South Africa’s democratic history.

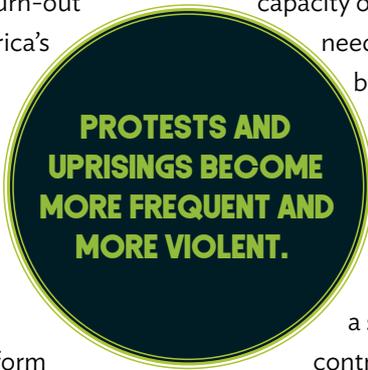
Further splits in the opposition appear after the 2019 election, but the majority faction of the DA is able to form coalitions with a range of niche parties, creating a series of short-lived governments at provincial and national levels. Factions and splinter parties spring into being like electrical particles and disappear just as quickly. Smaller parties become power-brokers in coalitions that are fluid and malleable.

Ultimately, the non-mandate of the 2024 voters ricochets through the halls of power. Polls show that the majority of citizens have become jaded and disillusioned.

**Empty pots and empty promises**

The politics of “survival and of the pot” continue in the poorer rural areas, while lawlessness grows in South African urban heartlands. Drought in the early 2020s – exacerbated by lack of longer-term planning and dismissal of the effects of impending climate changes that hit Africa hardest of all

continents – pushes even more people off the land, seeing ‘intermediate’ towns and cities swell with newcomers, while the larger metros also expand rapidly. In Gauteng and eThekweni in particular, sprawling informal settlements grow way beyond the capacity of metros to service residents’ needs. Protests and uprisings become more frequent and more violent.



**Tender nation**

Auditors battle to find a single school stationery contract in these provinces that had not been tainted by inflated prices, kickbacks and graft. It turns out that spending on health and education in five provinces had been particularly targeted by fraudsters, tendering for expensive mobile clinics, ambulances, and medical supplies. At the same time medical malpractice awards swallowed up provincial budgets.

Crime and gangsterism increase, along with cybercrime, credit card fraud and kidnappings. International syndicates begin to see South Africa as an easy mark, pouring hundreds of millions of Rand into building their networks and buying corrupt cops.

As policing becomes less and less reliable, South Africa enters a vortex of low growth, high crime and institutional incapacity. Water purification plants break down frequently and acid mining draining projects falter as they are hit by corruption and inefficacy.

The second phase of the Lesotho Highlands Water Project is further delayed, creating severe shortages of fresh water in South Africa's largest urban centres. Municipal corruption and inefficiency sees more than 100 municipalities placed under direct provincial control – a solution which seems to rarely solve anything.

### Slow growth and speed bumps

The brief burst of euphoria in 2018/9 and the short-lived economic recovery are replaced by more disinterested investors and a mini-recession, partly induced by a global slump after increased instability in the Middle East, Eastern Europe and the China Seas. The agreement on denuclearisation of the Korean Peninsula defies the enthusiastic tweets from the White House, as violations by North Korea are exposed.

A period of higher inflation, after the oil price shocks of 2023/4, cut into both wage gains and the real value of social grants (by then extended to 22 million beneficiaries), heightening the sense of divide between those who were able to earn a living and those who were 'granted' an income.

### Envy of the New Zimbabwe

While foreign direct and long-term investment increased for almost every SADC country in the 2020s, with Zimbabwe attracting billions in new investments and seeing returning members of the diaspora bringing skills



and capital, South Africa can only look on with envy, and a little resentment. Substantial non-speculative investments in mines, agribusiness and manufacturing begin to dry up.

By 2026/7, the unemployment figure surges past 10 million for the first time in South Africa's history, and the narrow definition of unemployment hovers around 30% as more people become discouraged from looking for work. Land transfers speed up dramatically, but food production does not and South Africa battles to feed itself. The promised support for new land owners proves ineffective, while the impact of global climate change and drought only worsen the ravages of the barren land.

The line between rich and poor is drawn ever more firmly, etched in the razor-wire and strands of electrified fencing that top the walls of private security estates.

South Africans, feeling poorer and poorer every year, do not enthusiastically participate in programmes to redress historical injustices or deal with devastating

levels of domestic violence, rape and femicide. Even changing names of places – once fiercely contested – attracts fewer and fewer participants at public consultations as people suspect such exercises are meant to detract from rising unemployment and growing poverty.

Rather, TV soap operas and reality shows offer escapism – and the illusion of a society where mobility is possible. But even on screen, the poor seldom see their own reality reflected. Every programme seems to punt the same aspirational message: strive for wealth, as only wealth is worth having! Being poor is seen as a self-imposed condition, not a structural disorder.

Inequality surpasses the high levels of the 2010s. By the late 2020s, the top 10% of wealthy South Africans reap almost 70% of all income, a grim reality that sows higher levels of alienation and social distance.

This is made worse by South Africa's overlapping health disease burdens: although new HIV infections are reduced to under 200 000 a year by the mid-2020s, levels of diabetes,

heart disease and cancers grow. Major government campaigns to get people fitter and slimmer, targeting sugar-sweetened beverages and trans fats – and pleas to walk and move more – do little to dent the gradual increase in the average national waistlines and body masses.

### **Downsizing the government**

In desperation, the shaky coalition government makes some bold moves. Government, they said, was way too bloated with too many levels and layers and too many SOEs operating outside sustainable market forces and beyond disciplines of prudent capital allocation and pricing. More private electricity suppliers are allowed onto the grid. Instead of expanding the state bank established by the ANC government in 2022, the DA-led government closes it down after the 2024 election.

### **First there were four, then there were nine, then there are six**

More dramatically, the coalition unleashes Sections 73 and 74 of the Constitution. Provincial consolidation is enacted to reduce the number of provinces from nine to six (during the days of apartheid there were four plus the Bantustans), with the additional amalgamation of municipalities into ‘super metros’ in rural and urban areas. This serves the DA’s and EFF’s electoral interests.

Despite prolonged debate and public consultation, such changes convulse South Africans opposed to some of

the provincial consolidation in angry protests. Schools are torched, and highways blocked, but a determined coalition forces the pace of change. Fervent and repeated constitutional court challenges come to nothing, and the North West-Free State provinces, and the Northern and Eastern Cape respectively are amalgamated by 2028.

Billions of Rand in savings and better governance soothe some the naysayers, as flows of resources to those who need them most improve a little. The merger of Mpumalanga and Limpopo, widely predicted to be a firestorm, goes better than expected as efficiencies emerge quickly.

### **The metros get mightier**

This boundary shifting is not confined to provinces. Responding to clamours from below, the coalition reorganises at the local level, with powers more efficiently devolved between the six provinces and about 50 or so new ‘super metros’, each containing four or five previously stand-alone municipalities. These 50 areas of governance allow for a better concentration of expertise and economies of scale.

### **From low growth to no growth**

But despite the post-2024 commitment to cleaner and more effective governance, the economy refuses to take off. For the second time since liberation, government fails to create the policy certainty

that allows other countries to ride to riches in the great commodities boom of the mid- to late-2020s. Ambiguity about property rights, restrictions on non-local land ownership and rising crime rates all play a part in deterring inward investment, despite South African award-winning ‘national brand’ marketing campaigns.

Tourism slows too, as kidnappings of wealthy tourists spike in 2024/5. Even special tourism protection units of the SAPS are unable to stem the tide, partly because two notorious unit commanders were arrested for feeding information about tourist movements directly to hijacking gangs. At points, global headwinds and short-lived downturns also interrupt the flow of foreign investments and encourage wealthy South Africans to ‘diversify their holdings’. Many do, as the elite moves assets and often their children’s education offshore.

The more streamlined local and provincial government structures start generating savings and synergies and reversing some of the legacies of apartheid’s rural spatial and land policies. Short and long-distance travel is better subsidised and supported, and measures of order are brought to pockets of taxi operations.

Traditional leaders become more representative of their constituencies, and smaller-scale agriculture flourishes where people have security of tenure and proper support from local state programmes and NGOs. Linkages with

agribusiness, some forced through charters and through improvements in minimum wages for those in the agricultural sector help several rural economies recover and move forward.

### Watching from the side-lines

As the economy slows, despite the global boom in demand, it looks like South Africa is losing out again. The exchange rate tests a new low against a basket of global and continental currencies as capital takes flight. Zimbabwe's post-2018 government oversees six percent growth rates in early 2020s, and Mombasa's new international airport starts allowing tourist and investors to bypass OR Tambo when venturing into Africa. Mauritius and Botswana become mini-hubs of continental finance and trade coordination, despite South Africa's previously unassailable financial services infrastructure.

Kenya, Ghana and Nigeria, notwithstanding their high levels of inequality, also thrive, and the deepening of democracy in Angola and high average 2020s oil prices see the country – and many of South Africa's other neighbours – boom until the global crash of 2026 destabilises many economies.

### The unravelling

These regional successes only highlight South Africa's failures and how it stymied investment into its bountiful mineral and agricultural complexes

that could have generated great wealth for the nation. Unemployment rises. Scapegoats are sought. Ethnic tensions increase. In many areas, foreigners are targeted. Inter-generational strife and incomprehension grow, with the young convinced they were being sold a fake future.

The demand for cheap labour and sex remains unbridled while countless women, men and children are caught up in local and transnational human trafficking syndicates that, like their

come with a driver and an armed guard – become a feature of the well-to-dos' suburban life. The poor in many areas form self-defence units, long a feature on the Cape Flats, to protect life and property. But a new ruthlessness emerges as South African homicide rates increase, placing South Africa second in the world in terms of murders per 100 000 population annually towards the end of 2020s.

Emigration surges, led by the black middle classes: South African teachers,

### ARMoured UBERS

**The wealthy insulate themselves with the best security money can buy. Informal convoys are often arranged for travel out of secure areas and high security Uber-like taxis – that come with a driver and an armed guard – become a feature of the well-to-dos' suburban life.**

drug-dealing counterparts, find South Africa a useful hub for their operations. Indigenous gangs in the Western Cape expand their territory, moving firmly into Port Elizabeth, Durban and Gauteng. Vicious turf wars between local and Asian syndicates and Eastern European crime lords, as well as some local taxi bosses, see many South Africans caught in the crossfire.

### Your convoy or mine?

The wealthy insulate themselves with the best security money can buy. Informal convoys are often arranged for travel out of secure areas and high security Uber-like taxis – that

nurses, artisans and professionals are welcomed by an aging developed world that needs more health carers – and dog walkers. In 2028, almost 10% of Uber drivers in Toronto were revealed to be South Africans.

### A new dawn – or the glow of burning trucks in the distance?

After the raised hopes of the early 2020s, South Africa is even more of an up-and-down nation, with a more depressed and demoralised population drinking more readily.

For many it feels that a brighter morning is never coming.

Over time, the coalition government despite its liberal character clamps down and becomes increasingly controlling. No one dares to use the term ‘state of emergency’ or invoke Section 37 of the Constitution, but in many areas, this is effectively what is imposed. Individual freedoms are reduced. Reporting by the press is censored.

The state relies more on stronger ‘crowd control’ units of the South African police. The SANDF struggles to remain neutral, but there is not much resistance to this closing of democratic spaces as many citizens are willing to accept reduced freedoms in exchange for protection from an increasingly dangerous world.

### **Halala, Madam President**

After a bleak seven or eight years of growth rates of under one percent, many ‘technical recessions’ where no growth is achieved and 35 years after the first democratic election, South Africa, to the surprise of many, elects its first woman President and the first President from the generation born after 1980. Her declaration that “old men created this mess, let the women and the young clean it up” resonates with constituencies across South Africa, including many men.

Surrounded by those who came of political age in the 2010s, many committed and highly educated, their competence and confidence lights up

the nation, reviving a sense that real change is possible.

This unexpected late-in-decade euphoria reminds the older generation of a time when a hopeful nation had wished for renewal in 2019, only to have seen their hopes fade with the terrible turmoil in the early 2020s, as both the ruling party and the opposition parties were riven with schism and disunity. In 2030, the nation prays that this time it would be different for South Africa, and not, once again, just a promising mirage, or words from a forward-looking scenario.

## KEY FEATURES AND SYNOPSIS



- Social cohesion is in steep decline as people retreat to their linguistic and cultural identities
- Rising xenophobia, and South Africa's low-level gender civil war deepens as women become more empowered – and more targeted by men who feel left out of the mainstream
- Trust and belief – in fellow South Africans, immigrants and the state and social institutions – declines to new lows
- Many institutions are only partially 'liberated' – and some quickly get 'recaptured' by newly emerging elites
- Internecine battles within ANC continue – and other parties also fray, but retain enough coherence to form a coalition government between 2024 and 2029
- Foreign investment dries up and inflation increases steadily over the 2020s
- After prolonged debate and fierce contestation, the number of provinces are reduced to six
- Capacity declines in key areas of governance, and the reduction of provinces and the consolidation of municipalities into fifty administrative areas only partially alleviates the decline in services at local levels
- Ethnic and inter-generational tension and conflict increase
- Land grabs and highway blockades become regular occurrences and illegal mining spreads
- Unemployment never recedes below 25% – and then increases towards the end of the 2020s
- GDP growth averages 1.5 % over the decade with some periods of recession
- Attempts to improve state revenue through tax increases results in declining tax morality and compliance
- Debt to GDP increases to 80% by 2030 and South Africa's debt is downgraded to junk status

# LEADERSHIP GROUP

The Indlulamithi Leadership Group draws together **leaders from various sectors** in society. It serves **as a sounding board** for the project, providing strategic direction and insight.



**Frans  
Baleni**



**Reuel  
Khoza**



**Malusi  
Mpumlwana**



**Cas  
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# STEERING COMMITTEE

The Indlulamithi Steering Committee **handles day-to-day management** of the project, coordinates research and resource mobilisation, and approves the project agenda and documentation.



**Yacoob Abba Omar**



**Koosum Kalyan**



**Barend Petersen**



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**Andile Sangqu**



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**Uwais Razack**



**Barry Gilder**



**Joel Netshitenzhe**



**Siphokazi Sigenu**



**Xolelwa Kashe-Katiya**



**Vuma Ngcobo**



**Beth Vale**

The Indlulamithi project has drawn on the in-house research capacity of the Mapungubwe Institute for Strategic Reflection (MISTRA) and commissioned a range of research papers from outside experts. A research conference was hosted in February 2018.

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## CORE PARTICIPANTS AND INTERVIEWEES

The Indlulamithi Core Participants Group comprises a wide range of experts and influencers from the private, public and non-profit sectors, including civil society structures, political parties, trade unions and individuals from various professions. The Core Participants have taken part in workshops, discussions and detailed analysis of research findings in order to help shape the scenarios narratives.

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