

For immediate release



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Press release

Are we creating a better life for all? New report reflects on SA's developmental progress

Stats SA last week released South Africa's employment statistics for the fourth quarter of 2021. At 35.3%, it is common knowledge that South Africa has among the highest rates of unemployment in the world. Unemployment, together with the GDP growth rate, are arguably the two indicators most often used to gain a view of South Africa's level of economic development. These are important measures to track our progress (or lack thereof) in achieving the National Development Plan's (NDP) objective of "a better life for all", but there are many other indicators that should also inform our understanding of the state of affairs. Often, however, these statistics are hidden across different platforms or in lengthy reports. This leaves a great distance between the insights that the numbers provide, and the policy makers and general public who need to understand and contribute to South Africa's development trajectory.

At the end of 2021, the BER in collaboration with its partners completed the annual Assessment Report of South Africa's progress towards its development objectives. The report draws from the array of developmental targets included in the NDP, which align with the seven priorities of the Sixth Administration (listed by President Cyril Ramaphosa in his 2019 State of the Nation Address). It also takes more recent policy frameworks like the Economic Recovery and Reconstruction Plan (ERRP) into account, as well as Operation Vulindlela located in the Presidency and which supports the implementation of several components of the ERRP.

The rationale behind the Assessment Report is that without the proper measurement of outcomes and a data-driven view of progress, we cannot understand if South Africa is making headway along the road to economic development. The focus is on publishing a document that is concise and easy to interpret, in a format that is useful to policy makers as well as the general public.

Most of the outcomes that are included unfortunately sketch a bleak picture. The 2021 Assessment Report shows that the COVID-19 pandemic worsened conditions in SA's already struggling economy. The pandemic increased our crisis of unemployment and, without strategic interventions,

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poverty and inequality are likely to deepen. Other striking findings include the impact that this has had on the sense of unity among South Africans, health outcomes, and safety and security. Corruption and perceptions around the quality of governance remain concerns. To address these issues will require a consolidated effort by policy makers and civil society alike.

There are, however, also some positive developments: SA's existing system of social protection allowed a quick response to the needs of households whose incomes were affected by the pandemic. New power sector regulatory reforms signal greater political commitment to SA's energy transition, in turn creating a more attractive environment for international investment. The agricultural sector continues to perform well, and SA's level of GDP is expected to recover to its pre-pandemic level by the second quarter of this year.

The Assessment Report was distributed among the Cabinet towards the end of last year and the BER is now able to share the document more broadly. Some additional data points – like unemployment and fourth quarter GDP – were released after the report was finalised. In addition, National Treasury presented its Budget for the year and the President delivered the SONA. However, none of these developments or new data points have a material impact on the general trajectory and trends covered by the report.

The 2021 Assessment Report is attached to this press release and publicly available on the [BER website](#). By providing a means of tracking progress, we hope that it will help SA further along the way to a better life for all.

END

SOUTH AFRICA'S PROGRESS TOWARDS ITS DEVELOPMENT OBJECTIVES

2021 ASSESSMENT REPORT

This report would not have been possible without close collaboration and valuable inputs from a network of partners:

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List of acronyms

BCI	Black, Coloured and Indian
CPI	Corruption Perceptions Index
CSG	Child support grant
DSD	Department of Social Development
EAF	Energy availability factor
ECD	Early childhood development
ERRP	Economic Reconstruction and Recovery Plan
FDI	Foreign direct investment
GDP	Gross domestic product
GBH	Grievous bodily harm
GHG	Greenhouse gas
GW	Gigawatt
hhd	Household
HIV	Human Immunodeficiency Virus
IPP	Independent Power Producers
MMR	Maternal mortality ratio
Mt CO ₂ e	Million tonnes carbon dioxide equivalent
MTSF	Medium Term Strategic Framework
NDP	National Development Plan
NIDS-CRAM	National Income Dynamics Study – Coronavirus Rapid Mobile Survey
NPO	Non-Profit Organisation
OECD	Organisation for Economic Co-operation and Development
PHC	Primary Health Care
PLAS	Proactive Land Acquisition Strategy
RE	Renewable energy
REIPPPP	Renewable Independent Power Producer Programme
SAPS	South African Police Service
SDG	Sustainable Development Goals
SSA	Sub-Saharan Africa
STEM	Science, technology, engineering and mathematics
TB	Tuberculosis
TVET	Technical and Vocational Education and Training
UMC	Upper-middle income countries
WEF	World Economic Forum
y-o-y	year-on-year

Overview and objective

Introduction

In February 2021, the BER in collaboration with stakeholders from academia and civil society organisations published *South Africa's Progress Report towards its Development Objectives* (the "2020 Assessment Report"). The purpose of the Assessment report was to provide an overview of SA's development performance, specifically in relation to the objectives of the National Development Plan (NDP) and the seven priorities of the Sixth Administration listed by President Cyril Ramaphosa in his 2019 State of the Nation Address.

The 2020 Assessment Report received a favourable response from various policy and decision makers, the media and the general public. In the spirit of it being a 'living document' that tracks progress at frequent intervals, we have now prepared the 2021 Assessment Report. As with the previous iteration, this report is not aimed at prescribing policy making. Instead, the purpose is - through proper measurement - to reflect on SA's progress towards its development objectives. Where inadequate progress is observed, it remains the prerogative of policy makers to decide which policy levers to pull.

Strategic frameworks that guide SA's development objectives

The 2020 Assessment Report focused primarily on the objectives of the NDP and their alignment with the seven priorities of the Sixth Administration.

The NDP remains the guiding document for this year's Assessment Report and the priorities of the Sixth Administration are again used as broad framework, but in this iteration we also consider other strategic policy documents that have since become important - especially in the context of the economic disruption of the COVID-19 pandemic. In addition to the NDP, the 2021 Assessment Report also takes into account the Economic Reconstruction and Recovery Plan (ERRP) and Operation Vulindlela. Operation Vulindlela is located in the Presidency and supports the implementation of several components of the ERRP. Although the ERRP and Operation Vulindlela don't in all instances set quantifiable targets, they provide important guidance about what we should be measuring.

The ERRP aims to stimulate equitable and inclusive growth. It highlights eight high-impact interventions:

Infrastructure rollout, specifically in network industries like communications, freight transport and water	Food security
Improving energy security through stabilising the electricity supply	Localisation through industrialisation
Support for tourism, e.g. through a visa regime that attracts skills and grows tourism	Green economy interventions
	Macroeconomic policy interventions
	Public employment programmes

On what basis are the indicators selected

The objective of the Assessment Report is to evaluate development progress using select indicators that can preferably be tracked over time. The indicators are intended to monitor output and impact rather than inputs such as spending levels.

To the extent that it makes sense, we present updated data¹ for the same indicators used in the previous Assessment Report. The ERRP and Operation Vulindlela were kept in mind in our selection of indicators for the 2021 Assessment Report, and in many instances are aligned with the indicators that were used in the 2020 Assessment Report.

In some instances, however, alternative indicators are presented either because new data for a specific indicator is not available, or we have become aware of a more suitable indicator to reflect a specific development outcome.

Impact of COVID-19

While it is usually best to use outcome measures to evaluate progress, the pandemic has caused many social and economic outcomes to deteriorate. In some instances, a focus on outcome measures alone may currently be misleading as deterioration in outcomes may be a response to the short-term impact of the pandemic. Where we find this to be the case, we explain the linkages in the text. Some themes, such as health, education and social protection, warranted a closer look at the impact of the COVID-19 pandemic. These chapters therefore also include select indicators to illustrate the effect of COVID-19.

Final remarks

The COVID-19 pandemic worsened conditions in SA's already struggling economy. The pandemic has increased our crisis of unemployment and, without strategic interventions, poverty and inequality are likely to deepen. Striking findings highlighted in the 2021 Assessment Report include the impact that this has had on the sense of unity among South Africans, health outcomes, and safety and security. Corruption and perceptions around the quality of governance remain concerns. To address these issues will require a consolidated effort by policy makers and civil society alike. There are, however, some positive developments: SA's existing system of social protection allowed a quick response to the needs of households whose incomes were affected by the pandemic. New power sector regulatory reforms signal greater political commitment to SA's energy transition, in turn creating a more attractive environment for international investment. The agricultural sector continues to perform well, and we expect that SA's GDP will have recovered to its pre-pandemic level by 2022Q2. By providing a means of tracking progress, we hope that the 2021 Assessment Report will help SA further along the way to a better life for all.

¹ Some data series have been revised since the publication of the 2020 Assessment Report. Where agencies have made changes to historical data series, we present the updated series. This should be kept in mind when drawing comparisons between the results presented in the 2021 and 2020 Assessment Reports.

Summary of progress and trends

The summary below provides an overview of the direction in which select indicators have trended since the previous available observation. It does not reflect the full list of indicators included in the report and does not provide an indication of performance in absolute terms: all improvements are classified as green, even if SA missed a target or compares poorly to other countries. It therefore is an indication of trends rather than a judgement of whether SA is performing well/poorly in respect of a specific indicator.

LEGEND



Building a capable state

Political climate as constraint on business activities (2021)	Worsened
Perceptions about regulatory quality (2020)	Improved
Perceptions about the rule of law (2020)	Worsened
Perceptions about government effectiveness (2020)	Worsened
Political stability and absence of violence/terrorism (2020)	Improved
Perceptions about control of corruption (2020)	The same
Perceptions about voice and accountability (2020)	Improved

Fighting corruption

Corruption perception index score (2020)	The same
Number of whistle-blower reports (2020)	Worsened
Irregular expenditure by municipalities ¹ (2020)	Improved

Economy and employment

GDP growth (2021 forecast)	Improved
Per capita GDP growth (2021 forecast)	Improved
Fixed investment by the private sector (2020)	Worsened
Fixed investment by the public sector (2020)	Worsened
Distribution of income (2019)	Worsened
Unemployment rate (2021Q2)	Worsened

Environmental sustainability

Annual greenhouse gas emissions (2017)	The same
Carbon intensity: CO2 emissions per unit of GDP (2018)	The same
Size of land-based protected areas (2020)	Improved
Operational solar PV, wind and CSP capacity (2021H1)	Improved

An integrated and inclusive rural economy

Growth in value of agricultural production (2020)	Improved
Agricultural employment (2021Q2)	Improved
Unemployment in rural areas (2020)	Worsened
Land reform (2021)	Improved

Improving education, training and innovation

Share of successful matriculants in public schools (2020)	Improved
SA's rank on the Global Innovation Index (2021)	Worsened
Graduates in science and engineering (2020)	The same
Number of patent applications by SA residents (2019)	Worsened

Promoting health

Medical practitioners in the public sector (2020)	Improved
Maternal deaths per 100 000 live births (2017)	Improved
Respondents reporting health as 'excellent' (2021)	Worsened
Health screening during the COVID-19 pandemic (2021)	Worsened

Economic and social infrastructure

Access to electricity (2019)	Improved
Access to piped water (2019)	Worsened
Access to improved sanitation (2019)	Worsened
Eskom's electricity availability factor (2020)	Worsened
Water and electricity prices (2020)	Improved
Logistics performance Index score (2018)	The same
Access to the internet (2019)	Improved
Global rank in terms of ICT use (2020)	Worsened

Social protection

Prevalence of child hunger (2019)	Improved
Food insecurity in Mar 2021 relative to April 2020	Improved
Access to social grants (2021)	Improved
Number of pension contributors (2021)	Worsened
Number of medical aid contributors (2021)	Improved

Transforming human settlements and the national space economy

Hhd. investment in residential structures (2020)	Improved
Population living in metros, cities & large towns (2021)	Improved

Building safer communities

Number of murders (2020)	Worsened
The murder rate (2020)	The same
Detection of contact crimes (2020)	Worsened
Detection of murder (2020)	Worsened
Detection of aggravated robbery (2020)	The same
Incidents associated with xenophobic violence (2021)	Worsened
Trust in the police (2021)	Worsened
Perceptions of police involvement in corruption (2021)	Worsened

Transforming society and uniting the country

People are often treated unfairly under the law (2021)	Worsened
Trust people from other ethnic groups (2021)	Worsened
Trust people from other religions (2021)	Worsened
There is more that divides us than unites us (2021)	The same

Positioning SA in the World

Exports and imports as a share of GDP (2020)	Worsened
Contribution to UN peacekeeping operations (2021)	Worsened
Growth in real exports and imports (2020)	Worsened
Value of exports exceeding that of imports (2020)	Improved
SA's merchandise trade with SSA (2020)	Worsened
Ranking on the Global Competitiveness Index (2019)	Improved
Tourism: inbound trips in 2020 relative to 2019	Worsened

Notes: ¹ The improvement may be due to a number of municipalities not yet having submitted their audits for the 2019/20 financial year.

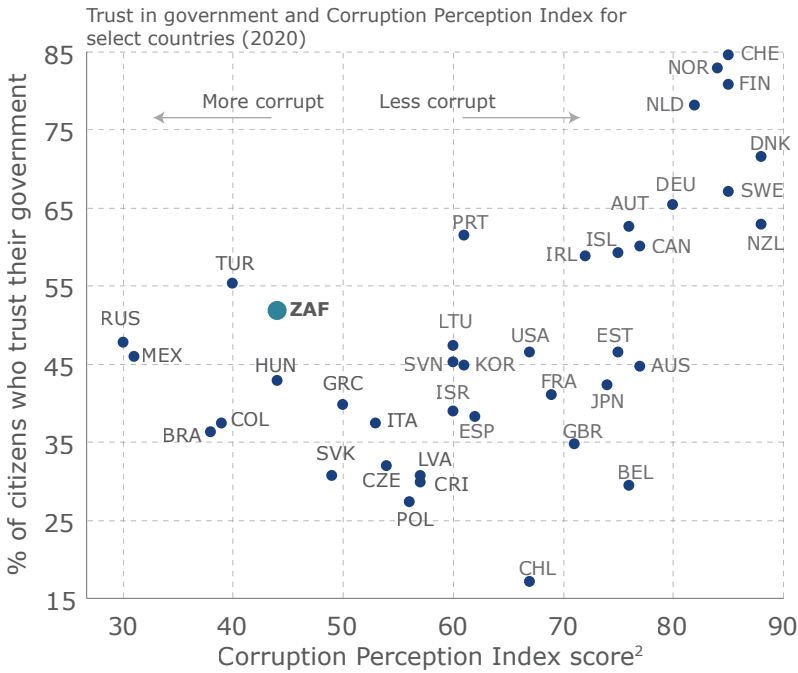
Priority 1: Creating a capable, ethical and developmental state

NDP Chapter 13: Building a capable state
NDP Chapter 14: Fighting corruption

Building a capable state

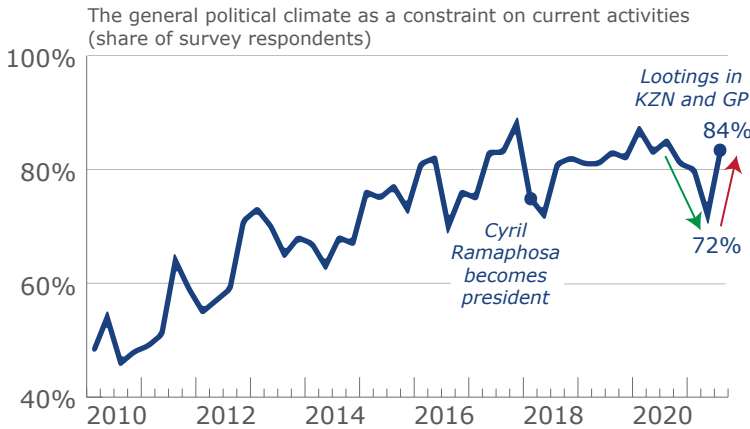
Much of SA's success in achieving its developmental objectives hinges on having a capable, ethical and developmental state. It is the first priority of President Ramaphosa's goals for the Sixth Administration. As evidenced by debates about the municipal elections, service delivery remains among one of SA's greatest challenges and suggests a lack of capability especially at the level of local government¹, amongst other factors.

Trust in government



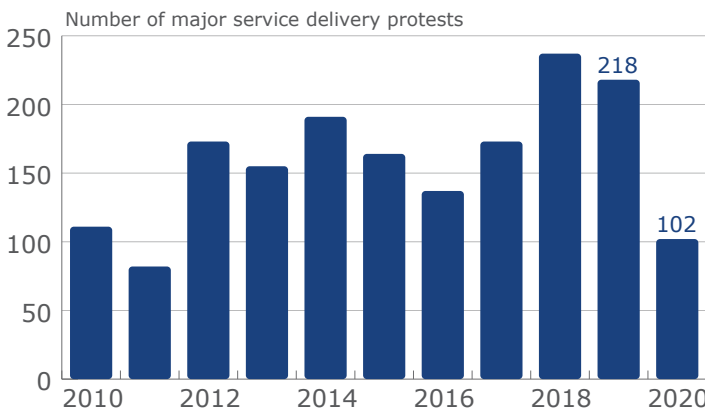
The general political climate

The looting in KZN and parts of GP during July 2021 caused an increased share of respondents to list the general political climate as a constraint on business activity.



Service delivery

The decline in major service delivery protests in 2020 can likely be attributed to lockdown measures that prohibited public gatherings.

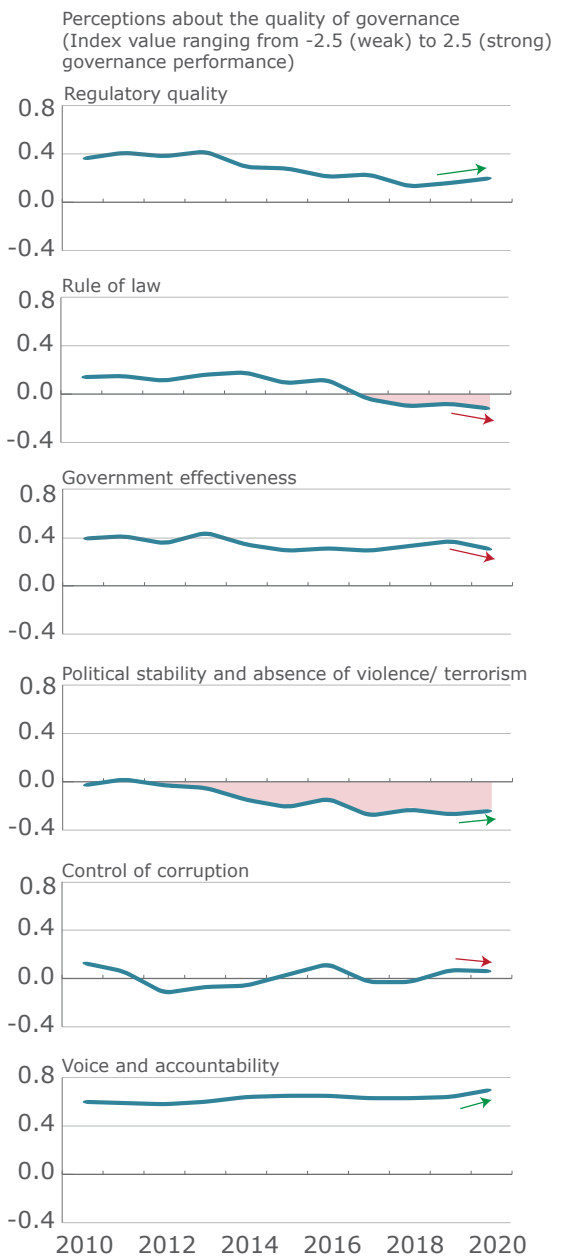


Notes: ¹ Fourie, H. & J. Kirsten (2021). SA's municipal challenges and their impact on local economic development, *BER Research Note 6 of 2021*. ² The Corruption Perception Index provides a measure of the perceived levels of corruption in a country's public sector with 0 = highly corrupt and 100 = least corrupt.

SA's comparatively poor Corruption Perception Index score (see figure on the left) is likely one of the reasons why close to half of citizens did not respond "yes" to the question "In this country, do you have confidence in... national government?".

Quality of governance in SA

In 2020, there were slight improvements in the perceived quality of governance in respect of regulatory quality and voice and accountability. Perceptions about political stability remain weak but show a slight improvement. Perceptions about government effectiveness, the rule of law, and control of corruption declined.

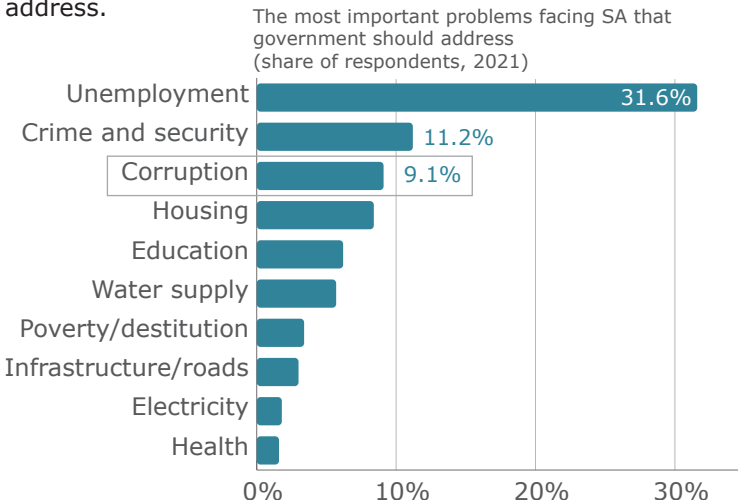


Fighting corruption

Corruption remains among one of the most pressing problems in SA. In light of the 2021 municipal elections, perceptions about the level of corruption among local government councillors are particularly worrying.

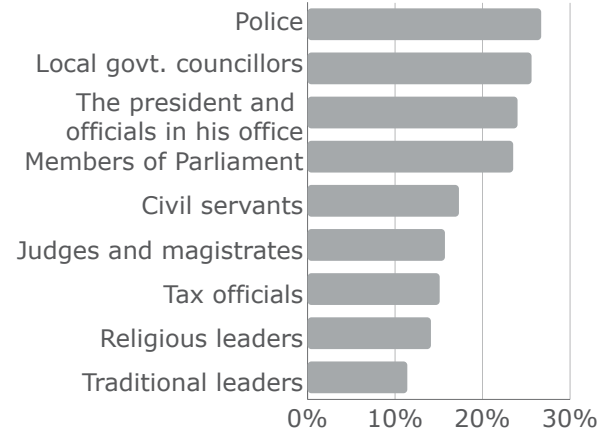
Problems that government should address

Close to one out of 10 South Africans see corruption as the biggest problem that the government needs to address.



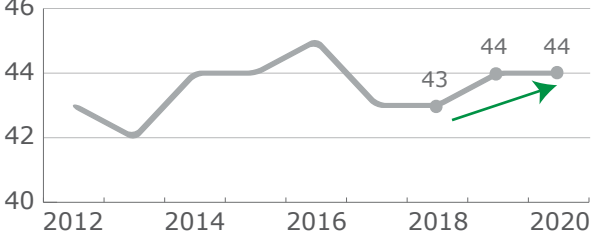
Perceptions about involvement in corruption

Share of respondents that answered "All of them" to the question: How many of the following people do you think are involved in corruption? (2021)



Public and private sector corruption

Corruption Perception Index score (index value) (0 = highest and 100 = lowest level of perceived corruption)

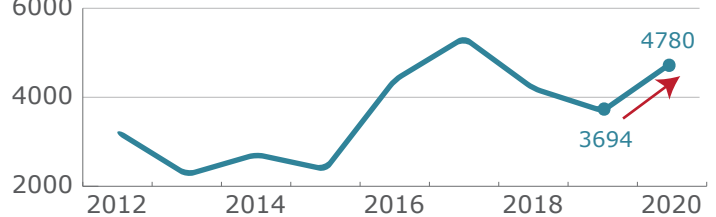


The Corruption Perception Index score measures the perceived levels of corruption in the **public sector**. SA's score improved slightly from 43 points in 2018 to 44 points 2019, but in 2020 SA maintained the same score as it had in 2019. Its rank, however, improved from 70th place in 2019 to 69th in 2020.

61%

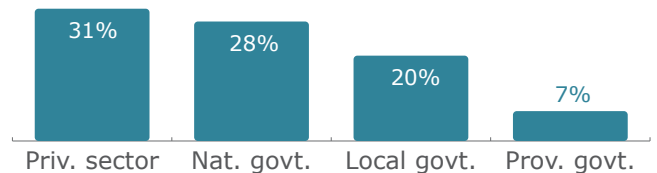
Share of respondents that rate government performance in handling the fight against corruption in government as "Very badly".¹

Number of whistle-blower reports received by Corruption Watch



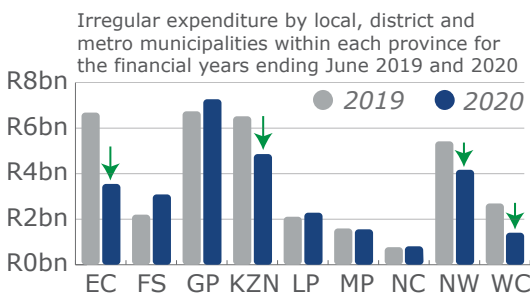
In 2020, Corruption Watch received one thousand more whistle-blower reports about reported incidents of corruption than in 2019. Most of these reports (43%) came from the Gauteng Province.

Institutional location of corruption (share of whistle-blower reports received by Corruptions Watch from Jan to Jun 2021)

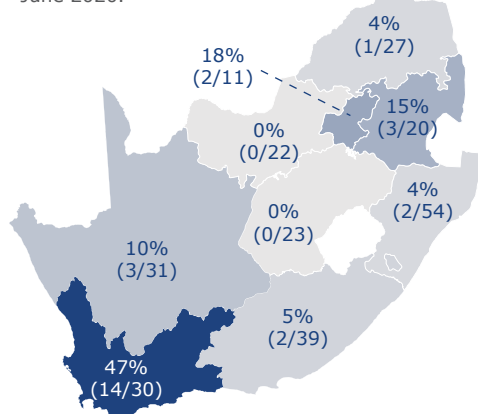


Audit outcomes of municipalities

Irregular expenditure by municipalities declined in four provinces and on aggregate². Audit outcomes remain poor, with only 11% of municipalities receiving a clean audit in the financial year ending 2020.



Percentage (and number) of local, district and metro municipalities that submitted their audits on time and received a clean audit (unqualified without findings) in the financial year ending June 2020.



Close to a third of whistle-blower reports received by Corruption Watch during the first half of 2021 related to corruption involving the **private sector**.

Most common types of corruption

- Maladministration - 16%
- Procurement - 16%
- Abuse of authority - 15%
- Fraud - 12%
- Bribery - 10%
- Failure to act - 9%
- Embezzlement - 5%

Notes: ¹ Afrobarometer Round 8 survey in South Africa, 2021, compiled by Plus 94 Research and the Institute for Justice and Reconciliation. ² The values exclude municipalities that did not submit their audits in time to be included in the Auditor General's Annual Report

Priority 2: Enhancing economic transformation and job creation

NDP Chapter 3: Economy and employment

NDP Chapter 5: Environmental sustainability

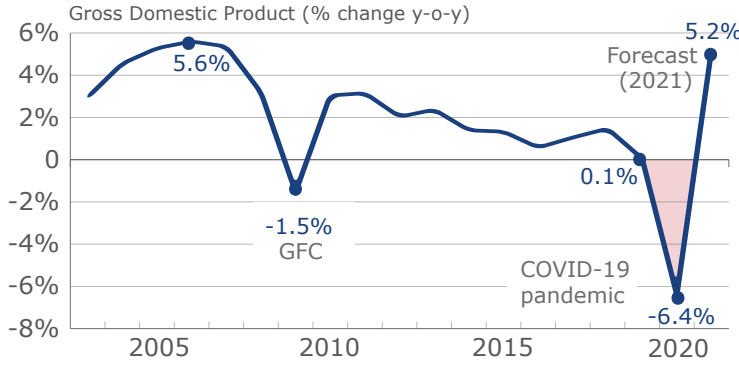
NDP Chapter 6: An integrated and inclusive rural economy

Economy and employment

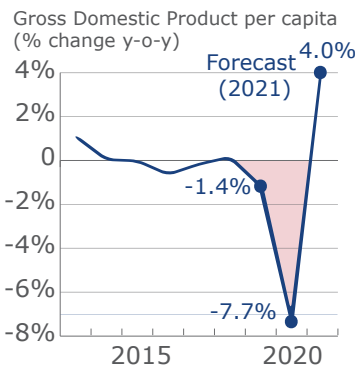
The ERRP recognises that SA's challenges have increased due to low levels of investment and growth. The fiscal space to adapt to these challenges have been constrained by a high budget deficit, large debt and a rising interest burden. All of these factors have made it more difficult to address the crisis of unemployment.

Economic growth¹

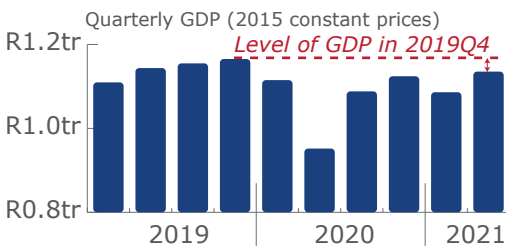
SA was already in a weak economic position before the onset of the COVID-19 pandemic. GDP declined by 6.4% during 2020 - a far greater dip than was experienced during the global financial crisis.



Since 2014, population growth has exceeded GDP growth which has caused negative GDP per capita growth. In other words, in real terms, the average South African today is poorer than he/she was in 2014. If SA had maintained a low yet consistent growth rate of 3% from 2015 onward, the average South African would have been 10% more wealthy in 2019.



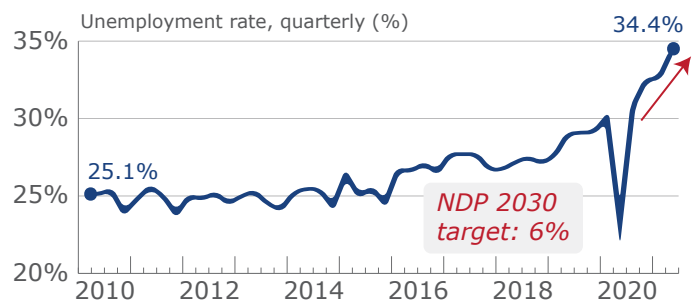
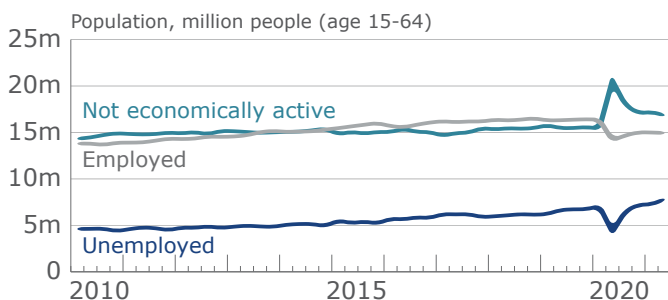
Impact of the COVID-19 pandemic on the level of GDP



While SA's GDP growth rate is projected at 5.2% for 2021², by 2021Q2 real GDP had not yet returned to pre-pandemic levels.

Employment

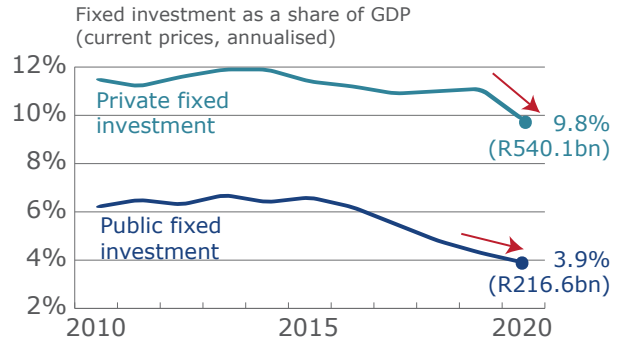
The NDP sets a target for total employment of 24 million people and an unemployment rate of 6% by 2030. The effect of the COVID-19 pandemic on employment is seen in the steep increase in the 'not economically active' population, as well as the decline in employment. The same number of people were employed in 2020 as in 2014, but SA's unemployment rate rose steeply due to population growth and the fact that the increase in the working age population was not absorbed by the labour market. The temporary drop in the 2020Q2 unemployment rate results from the number of unemployed who gave up on seeking a job during that time and instead became part of the 'not economically active' population.



Notes: ¹ Estimates based on Stats SA's rebased GDP estimates (seasonally adjusted, annualised) using 2015 as the base year. ² BER October 2021 forecast. ³ Includes general government and public corporations. ⁴ Chatterjee, A., L. Czajka & A. Gethin (2021). Can redistribution keep up with inequality? Evidence from South Africa, 1993-2019. World Inequality Lab - Working Paper No. 2021/20

Fixed investment

Following Stats SA's rebasing of SA's GDP, fixed investment is even lower than previously thought. Total fixed investment in 2020 equalled just under 15% of GDP, far from the NDP target of 30% of GDP. Fixed investment by the private sector remains more than double that of the public sector³.

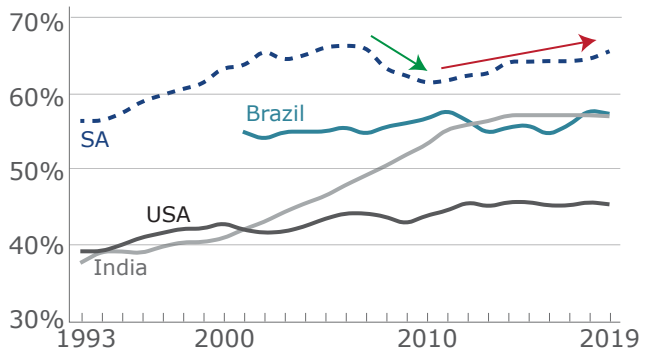


At COP26, select developed countries recently pledged R131bn over the next 3-5 years to help finance SA's energy transition. This will likely have a net positive impact on investment.

Inequality

Income is one of many factors that influence inequality, including economic activity, living standards (like access to services), education and health. In 2019, 10% of SA's population earned approx. 65% of pre-tax income.⁴

Distribution of income (top 10% pre-tax income share)



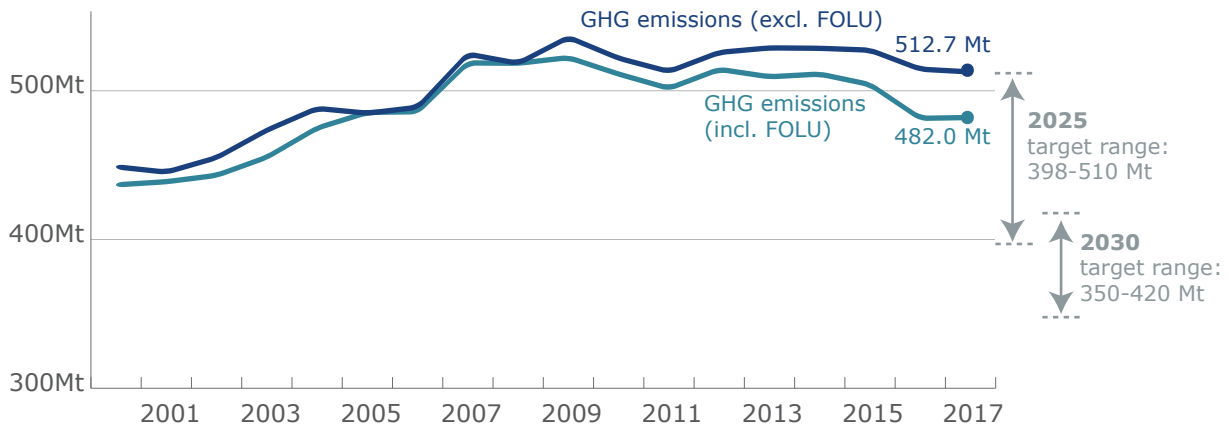
Environmental sustainability

Biodiversity plays a key role in ecosystem stability, food production and the economy. The ERRP specifically acknowledges opportunities in the green economy and the role of biodiversity for tourism. Developing and implementing globally recognised biodiversity protocols is one of the ways in which the supply-side capacity of the tourism sector might be strengthened following the COVID-19 pandemic.

Greenhouse gas emissions

SA amended its Nationally Determined Contribution to global emission reductions in 2021, and has committed to reducing emissions from 2025 onwards. The 2025 and 2030 target ranges¹ are shown below, with emissions (excl. forestry and other land use (FOLU) changes) in 2017 being just above the top of the 2025 target range. Overall, emissions (excl. FOLU) declined by 2.8% between 2015 and 2017.

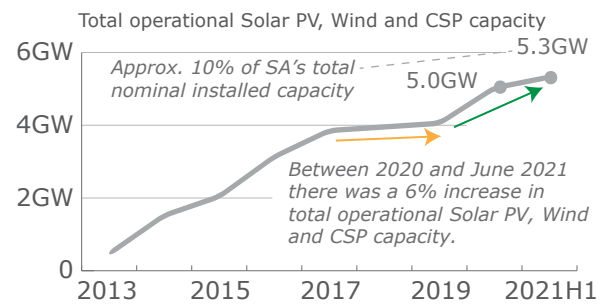
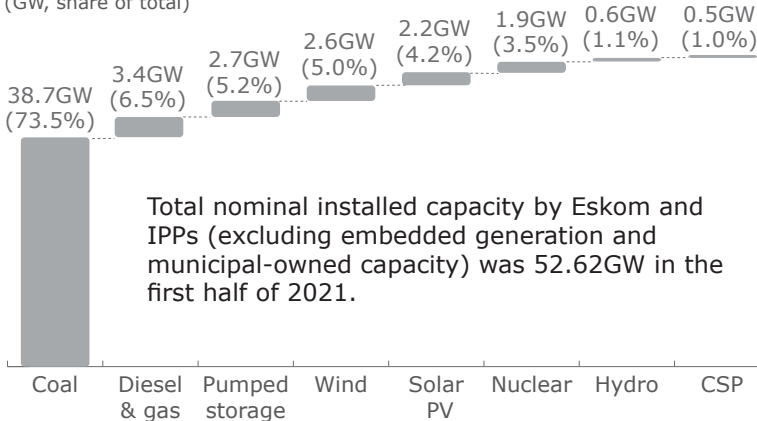
Annual greenhouse gas emissions (million tonne CO₂-equivalent)



Electricity generation capacity

During the first half of 2021, coal accounted for 73.5% of SA's nominal electricity generation capacity, and contributed 83.5% of total system demand.

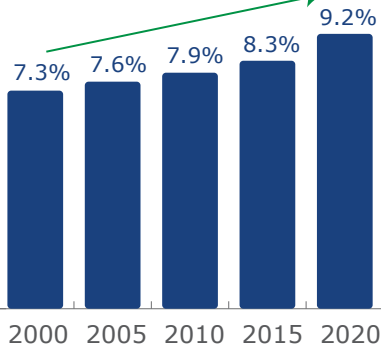
Nominal electricity generation capacity as at the end of June 2021 (2021H1)
(GW, share of total)



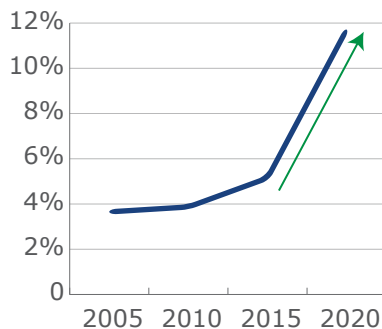
SA is the 12th largest emitter of greenhouse gases in the world. Although the procurement of new renewable power generation capacity has lowered the carbon intensity of SA's economy, this progress stalled for a number of years when the national renewable energy procurement programme was halted. Progress has once again picked up in 2021 with REIPPPP 5. A financing partnership of R131bn announced at COP26 between SA and select developed countries is also a significant development in supporting SA's transition to a low carbon economy.

Protecting biodiversity

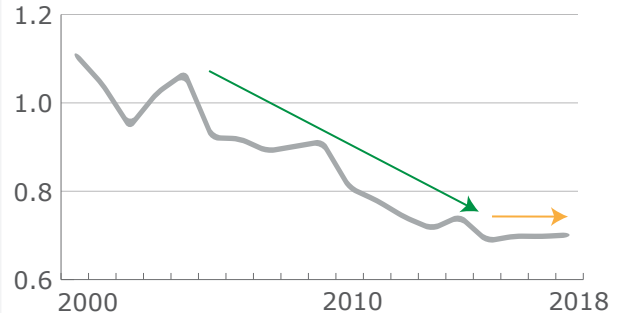
Land-based protected areas (share of SA mainland area)



Growth in land-based protected areas since five years prior



Carbon intensity: Annual CO₂ emissions per unit of GDP (kg per \$ of GDP; 2011 international-\$)



Cabinet approved the updated National Protected Areas Expansion Strategy (NPAES) and the revised National Biodiversity Framework in November 2020. The updated NPAES sets protected area targets and maps priority areas to ensure that no further ecosystems become endangered. In 2020, 9.2% of SA's mainland was protected, reflecting an encouraging 12% increase since 2015.

Notes: ¹The top of each range aligns with the Paris Agreement's temperature limit of "well below 2 degrees Celsius" and the bottom of each range is consistent with the 1.5 degrees Celsius temperature limit. **Acknowledgements:** Stefanie Swanepoel, African Earth Rights; Meridian Economics.

An integrated and inclusive rural economy

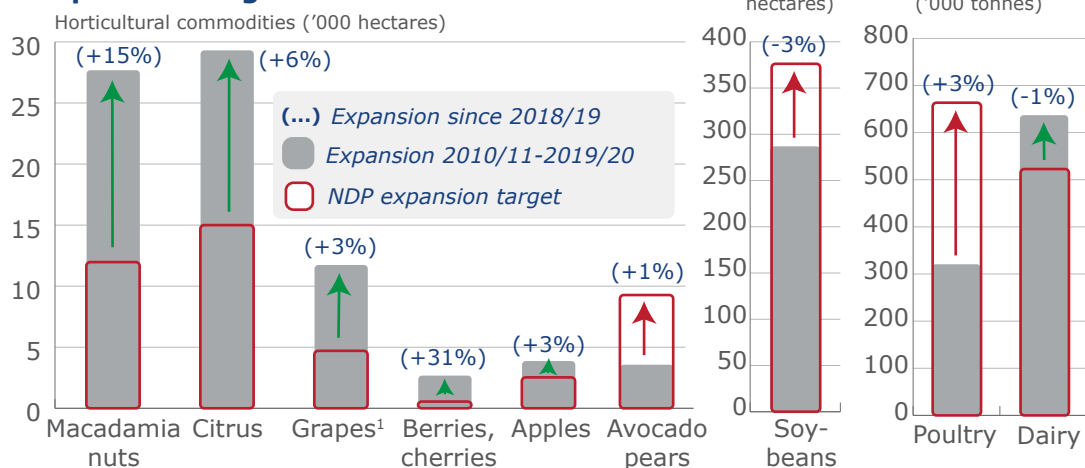
The agriculture sector proved relatively resilient amidst the COVID-19 pandemic, with the gross real value of agricultural production expanding by 6.4% between 2019 and 2020. The Agriculture and Agro-processing Master Plan is being negotiated to address the issue of inclusion and transformation of the sector and aligns with the priority of the ERRP to strengthen agriculture and food security.

Growth in gross real value of production (2019-2020)

Agriculture: **6.4%**
 Field crops: **19.2%**
 Animal products: **1.4%**
 Horticulture: **4.6%**

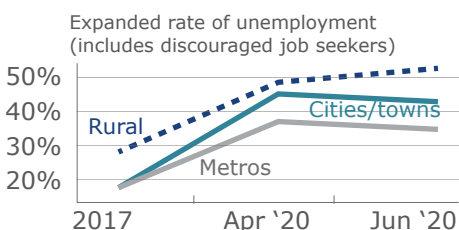
Avocado pears, soybeans and poultry have not yet reached the expansion targets that were set in the NDP.

Commercial agricultural expansion for select commodities relative to NDP expansion targets



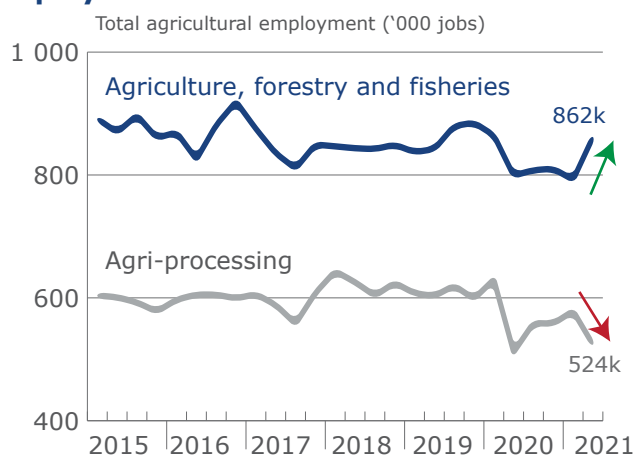
Unemployment in rural areas

In June 2020, the expanded rate of unemployment was 52% in rural areas, compared to 35% in metros.



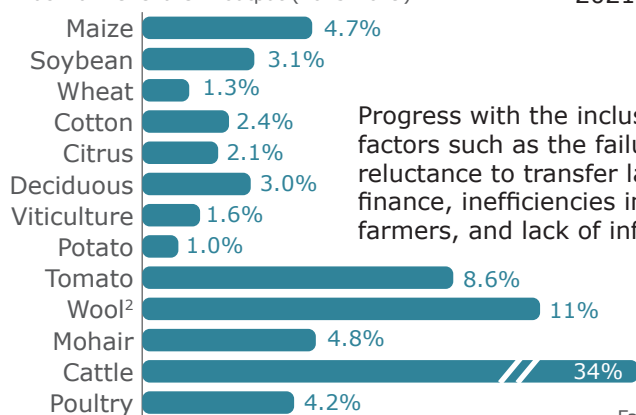
Agricultural employment

Agricultural employment has declined since the onset of the COVID-19 pandemic, but employment in primary agriculture showed signs of recovery in 2021Q2.



Transformation and inclusion

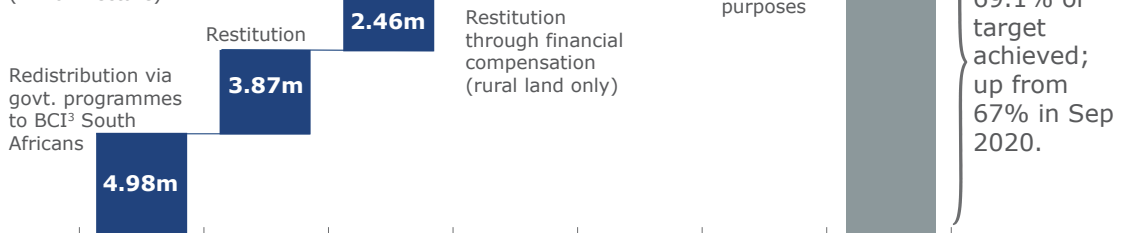
Black farmer share in output (2015-2019)



Progress with the inclusion of black farmers remains slow due to factors such as the failures in land reform delivery and government's reluctance to transfer land rights to beneficiaries, limited access to finance, inefficiencies in state administration and capacity to support farmers, and lack of infrastructure in farmer homelands.

Land reform

Land reform progress: 1994 to August 2021 (Million hectare)



By August 2021, SA had achieved 69.1% of the land reform target set in the NDP.

Notes: ¹ Includes table and dry grapes. ² Emerging and communal wool producers accounted for an estimated 18% of total wool production in volume terms during the 2020/21 season. ³ By Black, Coloured and Indian South Africans. **Acknowledgements:** BFAP, Johann Bornman.

Priority 3: Improving our education outcomes and skills revolution and ensuring a healthy nation

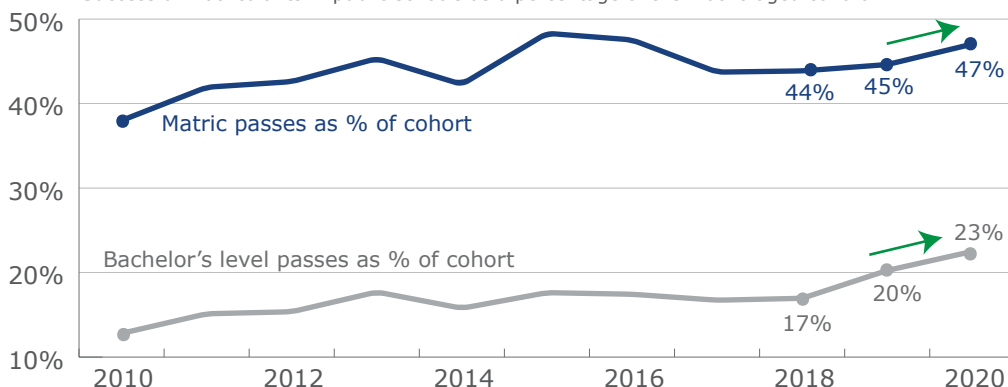
NDP Chapter 9: Improving education, training and innovation
NDP Chapter 10: Promoting health

Improving education, training and innovation

Some encouraging trends in education have emerged despite the COVID-19 pandemic. There has been an improvement in the share of successful matriculants, and attendance of ECD programmes had largely recovered by April/May of this year. Indicators that track innovation, however, paint a bleaker picture and suggest constraints in taking full advantage of the opportunities offered by the Fourth Industrial Revolution.

Schooling system

Successful matriculants in public schools as a percentage of the matric-aged cohort

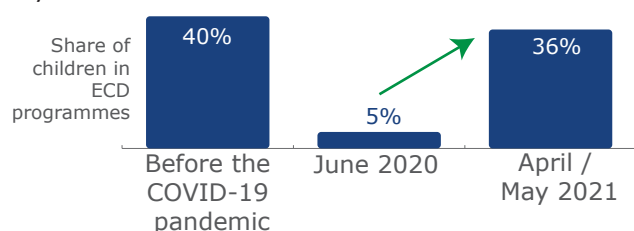


Matric passes and bachelor's level passes provide an indication of access as well as quality of the schooling system. Surprisingly, despite the upheaval of the pandemic, both ratios improved in the past few years. Especially encouraging is the strong growth of the proportion attaining Bachelor's passes.

Impact of the COVID-19 pandemic on education

Early Childhood Development (ECD)

Before the pandemic, 40% of children aged 0-6 attended an ECD programme¹. This proportion fell to 5% in June 2020, but recovered remarkably to 36% in April/May 2021.



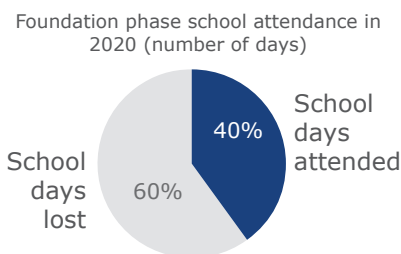
The recovery in ECD attendance was partly related to the reopening of ECD programmes, but also to improvements in household ability to afford ECD fees. In Nov/Dec 2020, only 24% of households indicated that they could afford ECD programme fees; this proportion increased to 59% reported in Apr/May 2021.

Household ability to pay ECD fees



Early grade reading

COVID-19 dealt a significant setback to early grade reading. In 2020, foundation phase learners attended school for only around 40% of the normal number of school days.



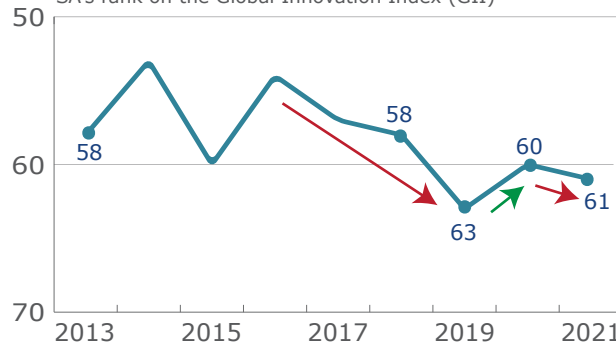
57-81%

Percentage reduction in children's home language reading development in 2020 compared to a normal grade 2 or 4 year.³

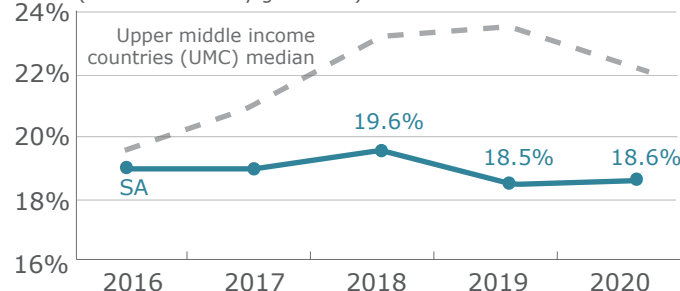
Innovation

SA climbed three places on the Global Innovation Index (GII)² between 2019 and 2021. SA is performing above expectations for its level of development. The GII, however, lists the low level of gross fixed capital formation as a share of GDP (see page 12) as a constraint to innovation. It also includes SA's low share of graduates in science and engineering, and poor 'ease of starting a business' as weaknesses of SA's innovation ecosystem.

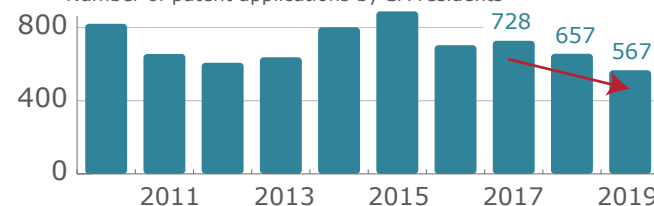
SA's rank on the Global Innovation Index (GII)



Graduates in science and engineering (% of total tertiary graduates)



Number of patent applications by SA residents



Notes: ¹ GHS, 2019; The NIDS-CRAM survey found a similar proportion of adults indicating that a child 0-6 in their household was attending ECD in February 2020, just before the first lockdown. ² The GII measures innovation performance across 132 economies, taking factors such as institutions, human capital and research, infrastructure, market sophistication, business sophistication, knowledge and technology outputs, and creative outputs into account. ³ Shepherd, D, & Mohohlwane, N. (2021). Changes in education: A reflection on COVID-19 effects over a year. NIDS-CRAM Report.

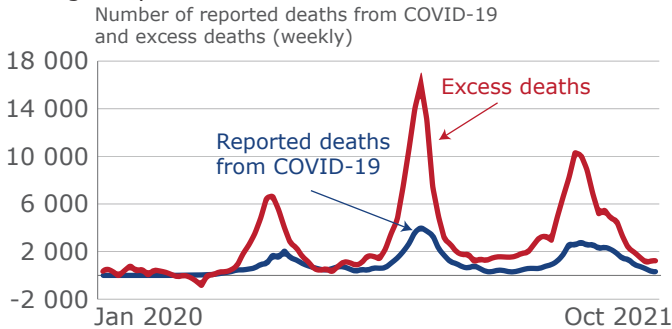
Acknowledgements: RESEP, Stellenbosch University.

Promoting health

The rise in unemployment has caused an increase in poverty and hunger (see page 20), which is expected to worsen health outcomes over the long run. The pandemic placed pressure on health systems and government finances, but also created opportunities to find new solutions and approaches. It required collaboration between the public and private healthcare sectors in vaccine delivery and encouraged an increased reliance on telemedicine.¹

Reported deaths from COVID-19 and excess mortality during the pandemic

Excess deaths (estimated as the deviation from the expected number of deaths) exceeds, yet closely tracks, the trend in the reported deaths from COVID-19. This strongly suggests that much of the current excess mortality during the pandemic can be attributed to COVID-19.

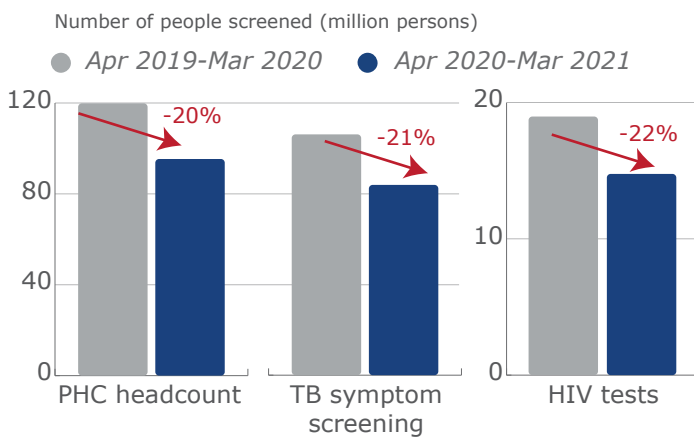


Comparing COVID-19 with SA's two largest causes of death in 2018² ('000):

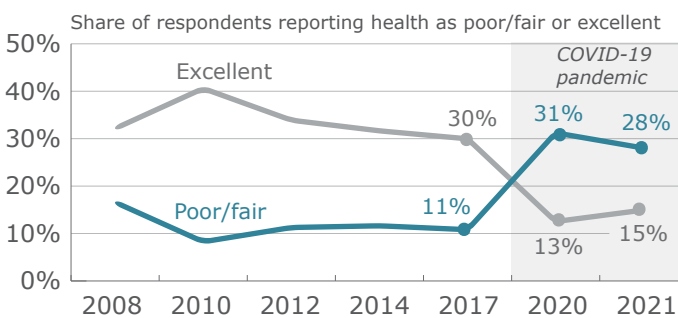
TB = 27.5 COVID-19 (2020) = 29.2
Diabetes mellitus = 26.9 Excess deaths (2020) = 87.5

Health screening and use of health services during the COVID-19 pandemic

The number of people who visited a Primary Healthcare (PHC) facility in 2020/21 dropped by 20%.



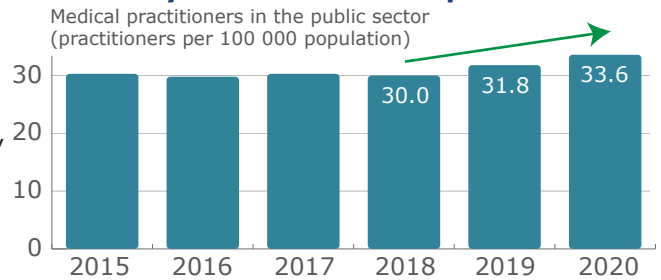
Self-reported health



The COVID-19 pandemic significantly worsened self-reported health outcomes, with a substantially smaller share of survey respondents reporting their health as 'excellent' than in previous years.

Notes: ¹ Telemedicine in the Western Cape Department of Health during the first peak of the COVID-19 pandemic (see *List of references* for full citation) ² Stats SA (2021). Mortality and causes of death in South Africa: Findings from death notifications 2018. ³ Fine, inhalable particles with diameters that are generally 2.5 micrometers, or smaller. ⁴ Health Systems Trust, SA Health Review 2020 ⁵ Part of priority monitoring areas nationally - Vaal Triangle Air-shed priority area. **Acknowledgements:** RESEP, Stellenbosch University; Prof Tom Moultrie, Centre for Actuarial Research (CARE) at UCT.

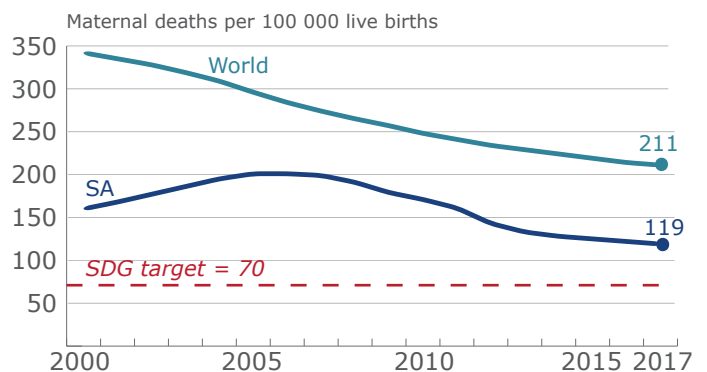
Availability of doctors in the public sector



The increase in medical practitioners working in the public sector is encouraging, although it remains far below e.g. Thailand (often held as an aspirational target for SA) with 80 doctors per 100k population. We'll only know by next year if the increase is transitory - it might be an effect of the COVID-19 pandemic, as many doctors were retained in 2020 after their community service to help alleviate pressure on the healthcare system.

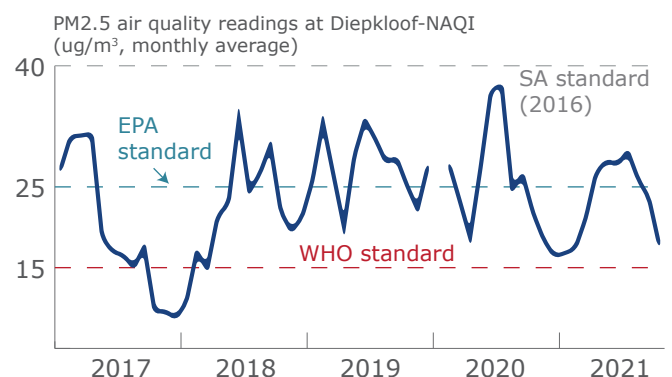
Avoidable maternal deaths

SA has achieved great progress in reducing its maternal mortality ratio (MMR), to 119 maternal deaths per 100,000 live births in 2017. This is much better than the global average but still far from the SDG target of 70. In 2019/20, SA achieved a *MMR in facility ratio* of 88, down from 105.9 in 2018/19.⁴



Environmental health: Air quality

Poverty is a major contributing factor to the use of domestic fuels in households. PM_{2.5} particles³ penetrate into the lungs, causing coughing, asthma or other serious diseases leading to premature death. Air quality readings at Diepkloof⁵, for example, remain far above the WHO standard.



Priority 4: Consolidating the social wage through reliable and quality basic services

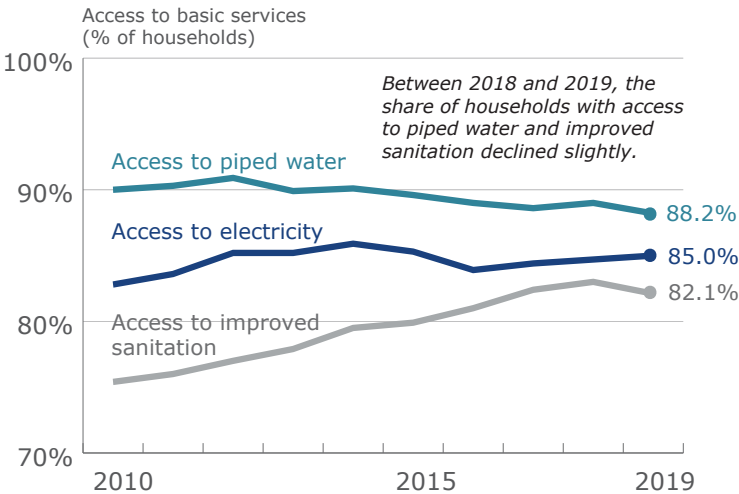
NDP Chapter 4: Economic and social infrastructure
NDP Chapter 11: Social protection

Economic and social infrastructure

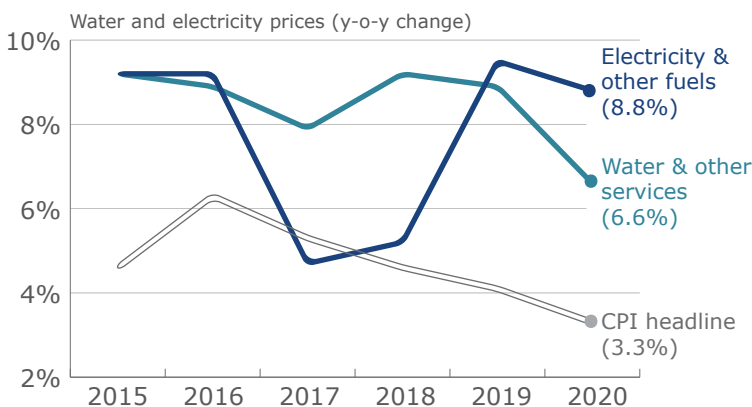
Effective and efficient economic and social infrastructure forms the backbone of any economy. It allows households to maintain a decent standard of living and is a necessary input into creating a healthy investment climate. The ERRP states that infrastructure investment, delivery and maintenance should play a leading role in SA's economic recovery. It also calls for the modernisation of freight and public transport as part of prioritising investment in network industries.

Basic services

Insufficient capital investment by local government and growth in the number of households in SA contributes to the slow progress with respect to access to basic services. Access to basic services unfortunately does not shed light on the quality of service delivery.¹ In 2019, 25% of South Africans reported some dysfunction in their water supply, up from 20.3% in 2018 (GHS, 2018, 2019).

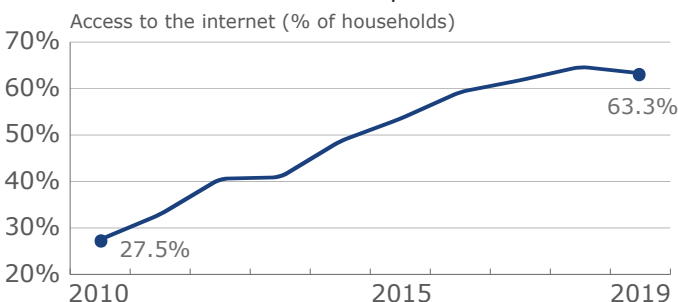


The price of electricity and other fuels as well as water and other services continues to increase at a greater pace than CPI headline (general consumer) inflation.

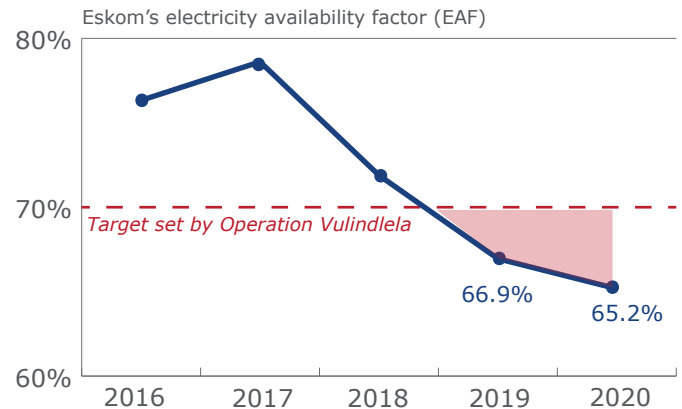


Information Communication Technology (ICT)

One of the five desired outcomes of Operation Vulindlela is to reduce the cost and increase the quality of digital communications. This requires faster progress on agreed reforms, such as increasing the availability of spectrum through a spectrum auction and migrating from analogue to digital TV. Delays in these reforms have curtailed investment in the sector and impacted on access² to the internet as well as on ICT use³.



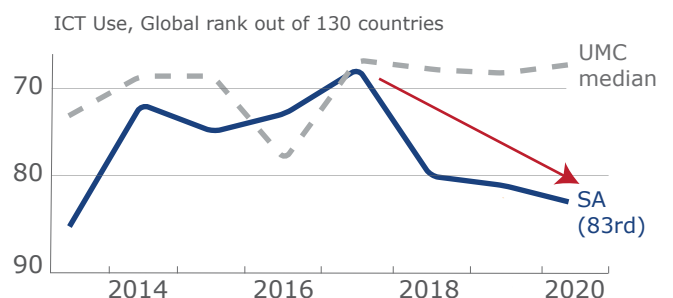
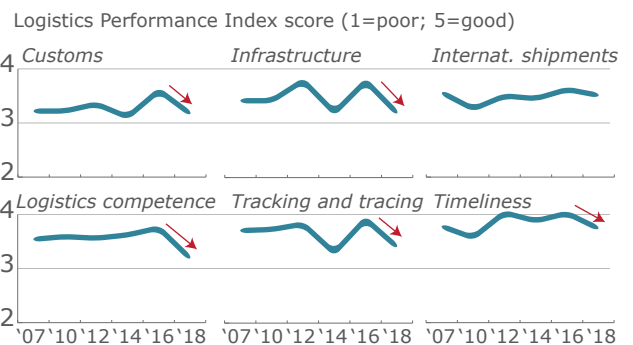
Notes: ¹ See e.g. BER Research Note 6 of 2021. ² At least one member who had access to, or used the internet either at home, work, place of study, internet cafés, or at public hotspots. ³ Composite indicator that equally weights (1) the share of individuals using the internet, (2) fixed (wired) broadband subscriptions per 100 inhabitants, and (3) active mobile-broadband subscriptions per 100 inhabitants.



Reforms in SA's energy sector are necessary to stabilise electricity supply. As evidenced by the EAF and severe load-shedding during 2021Q4, this goal has not yet been achieved. One notable reform of the past year, however, was lifting the licencing threshold for distributed generation from 1MW to 100MW. This will enable more large-scale projects to come online within shorter timeframes outside of the REIPPPP, whilst also stimulating greater growth, investment and competition in SA's power sector.

Transport

The World Bank Logistics Performance Index ranked SA 20th out of 160 countries in 2016, but its ranking fell to 33rd place in 2018. It reflects a deterioration in most of the subcomponents of the index.



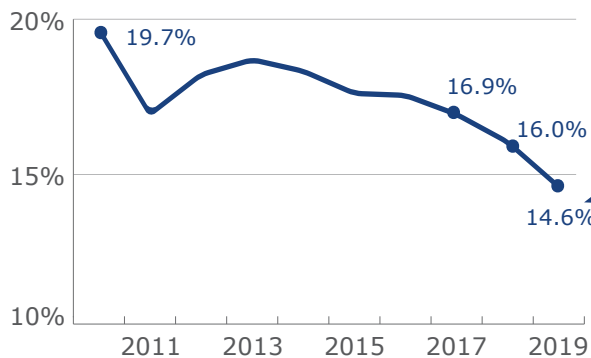
Social protection

SA's well-established social protection system¹ helped to mitigate some of the effects of the COVID-19 pandemic. A temporary social relief of distress (SRD) grant and temporary Employer / Employee Relief Scheme (TERS) were implemented to assist working-age individuals with no/ reduced income who did not qualify for other grants.

Prevalence of child hunger

Survey responses on hunger do not necessarily reflect how healthy nutrition is, but nevertheless provide a measure of household economic vulnerability. Over the past two decades, the roll-out of the Child Support Grant (CSG) significantly reduced the prevalence of child hunger. After rising during the Global Financial Crisis (to a high of 19.7% in 2010), it took 10 years for the prevalence of child hunger to progress below the 2007 level, reaching 14.6% in 2019.

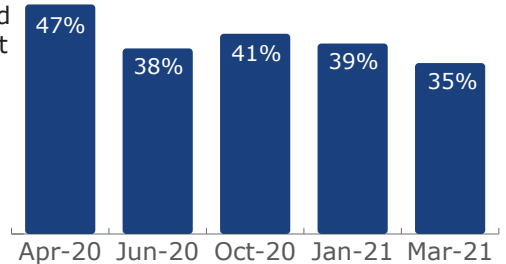
Percentage of households reporting that children went hungry in the past year: always, often, sometimes or seldom



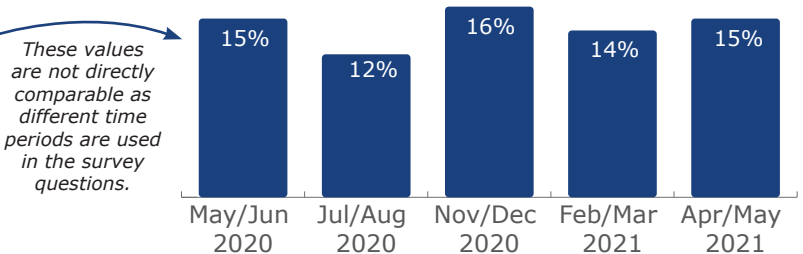
Food insecurity and hunger during COVID-19

The NIDS-CRAM survey showed a sharp escalation in hunger during the hard lockdown. Government responded by introducing top-ups to the CSG and Older Person's grant, and also introduced the SRD grant and the TERS. Funding to the DSD and NPOs to support provision of food parcels also contributed. However, child hunger remains at elevated levels, probably because employment has not yet returned to pre-pandemic levels.

Share of respondents reporting food insecurity (Question: **In the past month**, did your household run out of money to buy food?)



Share of respondents reporting child hunger (Question: **In the past 7 days**, has any child in your household gone hungry because there wasn't enough food?)

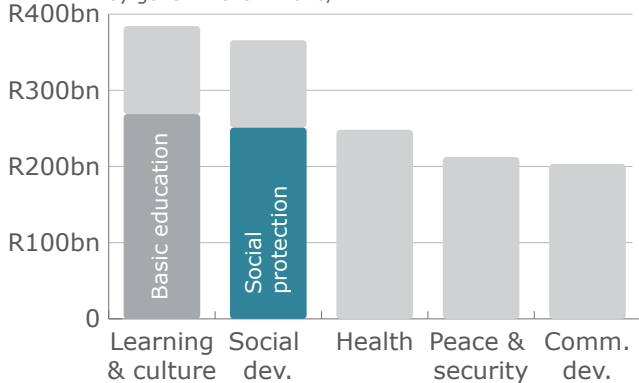


These values are not directly comparable as different time periods are used in the survey questions.

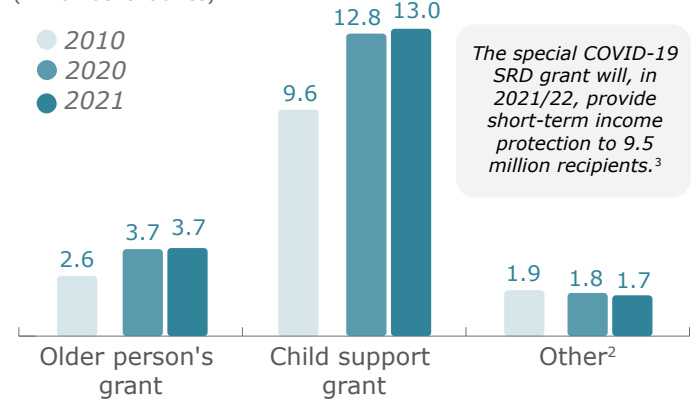
Social spending and social grants

In 2020/21, the government spent R251bn on social protection and an additional R114.7 on social security funds (like unemployment insurance). This amounted to total spending of R365.7 on social development. Social development is the second largest expenditure category after learning and culture (of which basic education is the biggest component).

The five largest components of consolidated expenditure by government in 2020/21



Number of social grant beneficiaries by grant type (million beneficiaries)

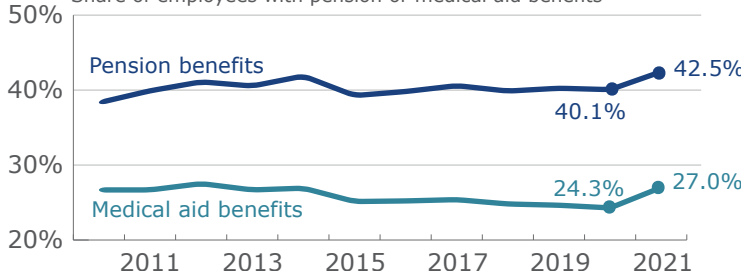


The special COVID-19 SRD grant will, in 2021/22, provide short-term income protection to 9.5 million recipients.³

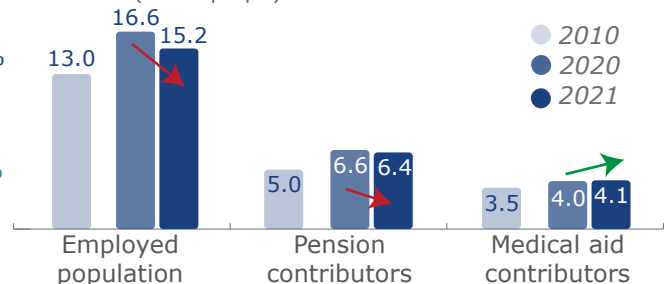
Employment-based insurance

The share of employees with access to pension or medical aid benefits increased in 2021, but this is largely as a result of the rise in unemployment and the associated decline in the number of employees.

Share of employees with pension or medical aid benefits



Number of employees contributing to pension funds and medical aid schemes (million people)



Notes: ¹ Other forms of social protection not shown here include national school nutrition programmes, expanded public works and community work programmes, and social security funds such as UIF. ² Includes war veteran, disability, grant in aid, care dependency and foster child grants. ³ Medium term budget policy statement 2021 (p. 43). **Acknowledgements:** RESEP, Stellenbosch University.

Priority 5: Enhancing spatial integration, human settlements and local government

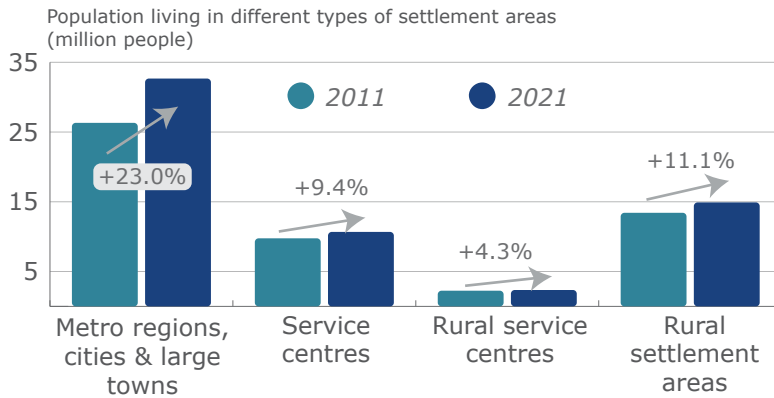
NDP Chapter 8: Transforming human settlements and the national space economy

Transforming human settlements and the national space economy

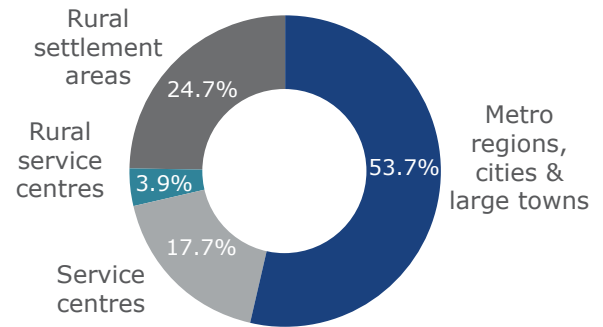
SA's metropolitan areas continue to experience growth in population and geographic footprint. At the same time, investment in residential structures in rural settlement areas and, more specifically, traditional authority areas have also become more substantial over the last decade.

Population distribution

The population living in metro regions, cities and large towns increased by 23% (approx. 6 million people) between 2011 and 2021. By 2021, 54% of South Africans lived in metro regions, cities and large towns compared to 51% of the population living in the same areas in 2011. The growth in population and residential structures in these urban areas, as well as in service centres (towns) and rural settlement areas - where the population on aggregate increased by 2.5 million - results in an increased demand for services.

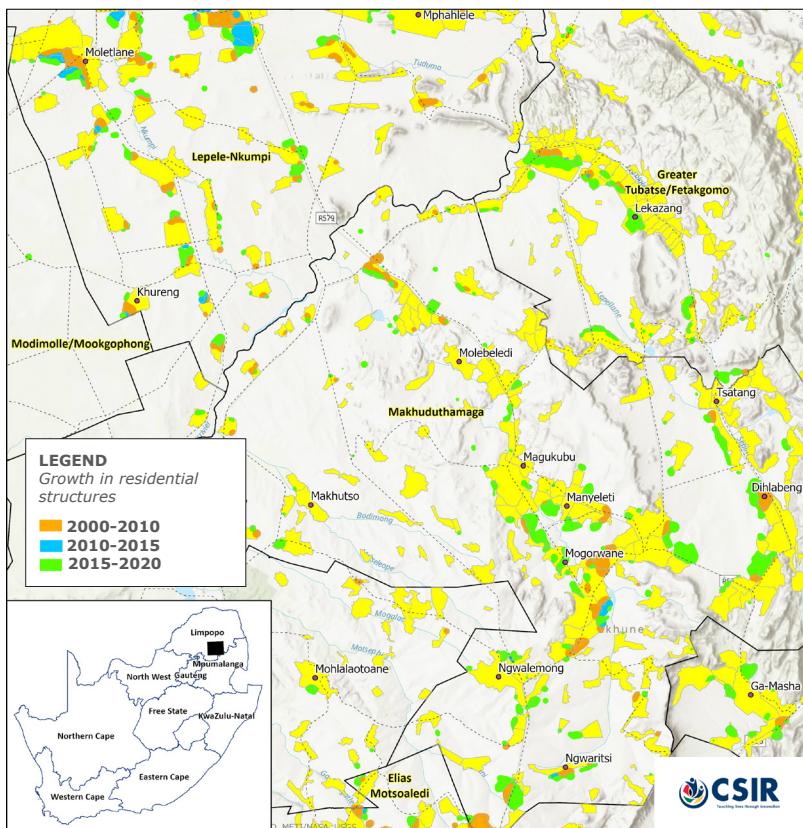


Share of population living in different settlement areas (2021)



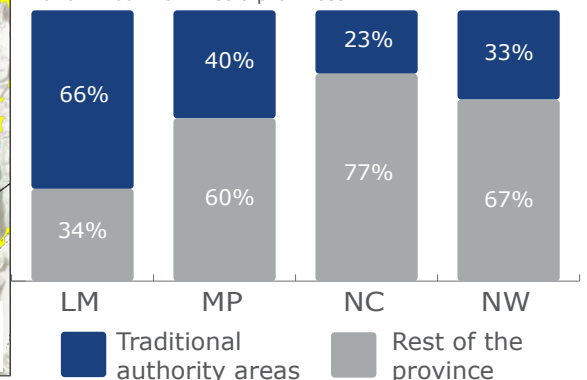
Settlement change: Settlement growth, especially in rural areas

Example of growth in residential structures in traditional authority areas



One of the most significant changes that took place within SA over the last decade has been the household investment in housing stock. The densification and expansion of settlements is evident in metropolitan regions, cities and large towns (with a yearly growth rate of almost 2%), but rural areas have also experienced a substantial increase in household investment in residential structures over the last decade. This is especially evident on land that is in traditional authority custodianship. In Limpopo, for instance, 66% of all new residential structures developed between 2010 to 2020 were in traditional authority areas.

Share of new residential structures built between 2010 and 2020 in four non-metro provinces



Settlement change: Growth in extra-legal and informal settlement formation

There appears to have been an increase in the overall incidence of land occupations, especially since the arrival of Covid-19. The recent extra-legal land occupations broadly take three forms.

1 Invasions of small parcels of marginal land in large cities, followed by rapid densification.

2 Occupations of larger land areas on urban peripheries with the low density building of rudimentary shacks that often remain unoccupied for some time aimed at claiming land for future use.

3 Building of higher-cost housing on customary land as an investment strategy with significant implications for settlement transformation, service delivery and municipal rates base.

Acknowledgements: CSIR (Dr Elsona van Huyssteen, Mr Gerbrand Mans, Mr Johan Maritz and Dr Mark Napier)

Priority 6: Advancing social cohesion and safe communities

NDP Chapter 12: Building safer communities

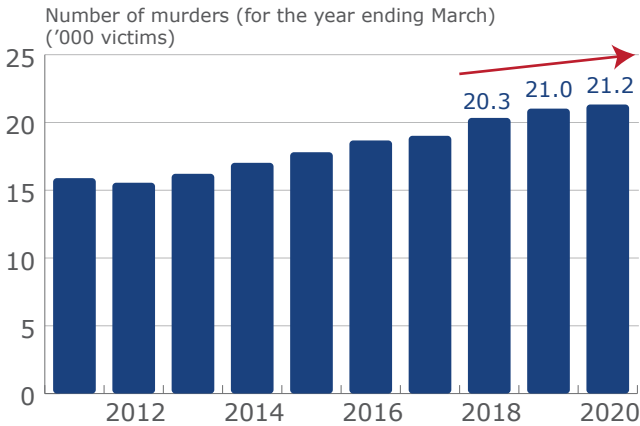
NDP Chapter 15: Transforming society and uniting the country

Building safer communities

Just over one in ten South Africans rate crime and security as the most important problem that government should address (see page 10). SA is struggling to lower its murder rate and crime detection rates continue to deteriorate.

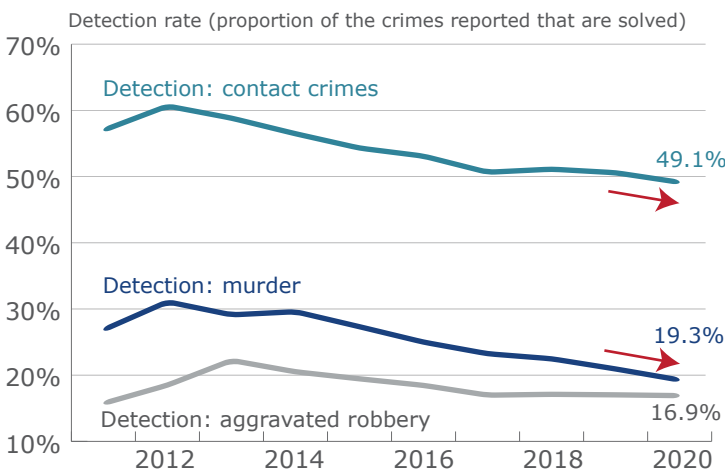
Prevalence of murders

In the SAPS financial year 2019/20, 21 325 murders were reported. SA's murder rate has stagnated at 36 victims per 100,000 of the population over the past three years.



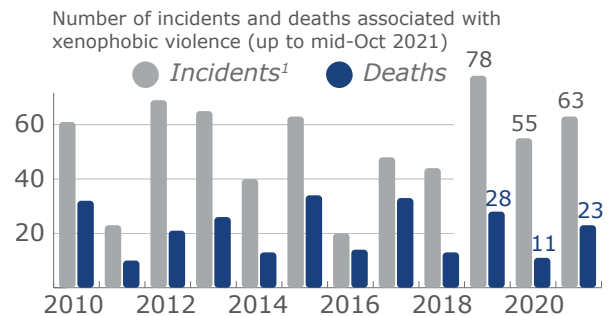
Effectiveness of the police

The downward trend in detection rates of contact crimes and murder is concerning, and speaks to the fact that SA has not been able to reduce the murder rate.



Safety of foreign nationals

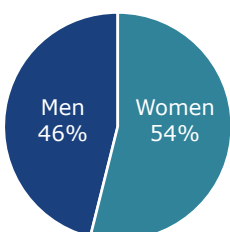
From 2010 to September 2021, 629 incidents of xenophobic violence resulting in 258 deaths were reported to Xenowatch. There have been more incidents and deaths caused by xenophobic violence by October this year than during the whole of 2020. The slight drop in 2020 might be attributed to the lockdown measures of last year.



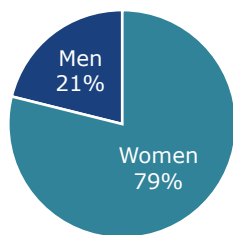
Crimes against women and children

The MTSF sets a target for a 6.7% annual reduction in crimes against women and children over the next ten years. Reported crimes against women decreased by 4.8% and crimes against children by 6.4% between 2018/19-2019/20, but this may be due to large and ongoing decreases in reporting rates for sexual and other forms of assaults. In terms of domestic violence, women are more likely than men to be victims of murder or assault.

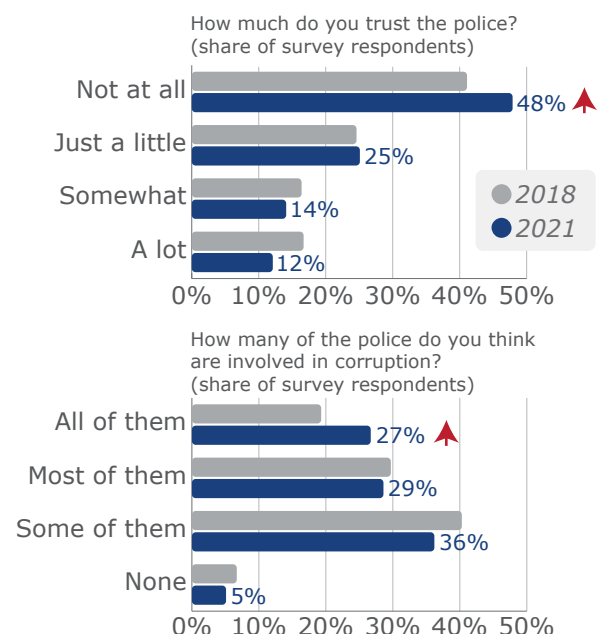
Share of domestic violence-related murders recorded by the SAPS (Apr to June 2021)



Domestic violence-related assault (all) recorded by the SAPS (Apr to June 2021)



Confidence in the police



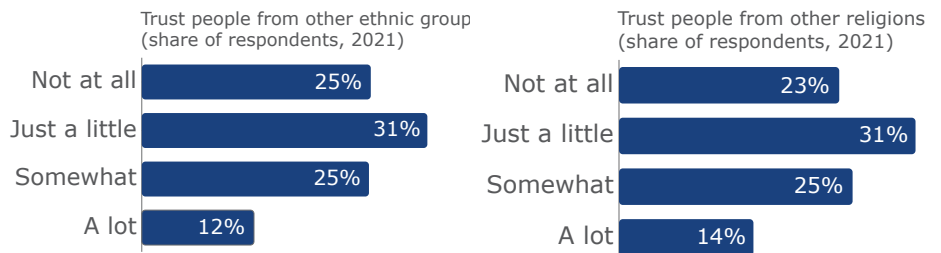
Notes: ¹ An act of violence targeting one or more persons due to their geographic or national background. An incident can result in one or more categories of victimisation and can affect several individuals. **Acknowledgements:** Gareth Newham, Institute for Security Studies.

Transforming society and uniting the country

Social cohesion can be seen as an 'outcome variable' of how SA is performing with respect to many of its other development objectives. SA's crisis of unemployment leads to poverty which makes it more difficult to address inequality, which in turn reduces trust, erodes a sense of national identity, and spreads division among South Africans.¹

Trust in other groups

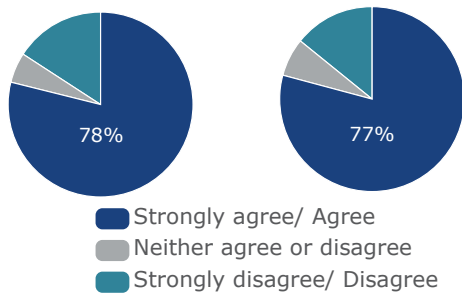
Most South Africans do not have a high degree of trust in people from other ethnic or religious groups. Only 37% of respondents said they have 'somewhat' (25%) or 'a lot' (12%) of trust in people from other ethnic groups, while there is a similar lack of trust in people from other religions.



Respondents were asked: How much do you trust each of the following, or haven't you heard enough about them to say?

Strength of national identity

Feel strong ties to other South Africans (share of respondents, 2021) Perceived as South African by others (share of respondents, 2021)



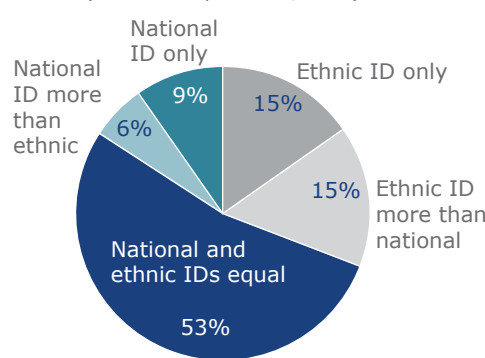
Despite a relatively high degree of distrust in certain groups, most South Africans (78%) agree that they feel strong ties to other South Africans and most (77%) agree that they are perceived as South African by others. These findings point to a relatively strong sense of national identity and a reciprocal recognition of this shared identity.

Respondents were asked: Please tell me whether you agree or disagree with the following statements: I feel strong ties with other South Africans; Other South Africans think of me as a South African just like them.

Ethnic or national identity

A small majority of South Africans (53%) feel equally strong ethnic and national identities. Most South Africans believe it is possible to have a shared national identity, while still maintaining ethnic or cultural ties. Close to one in three respondents (30%) indicated a stronger feeling towards their ethnic than national identity, with 15% saying they feel exclusively represented by their ethnic identity. It further appears that, over time, South Africans' affiliation with their ethnic identities have become stronger.

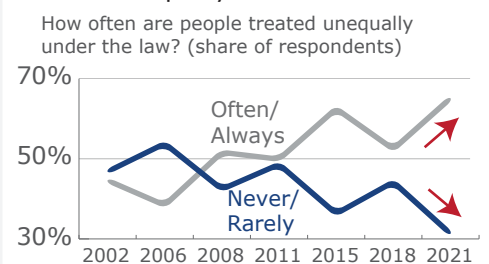
Do South Africans identify more with their ethnic or national identity? (share of respondents, 2021)



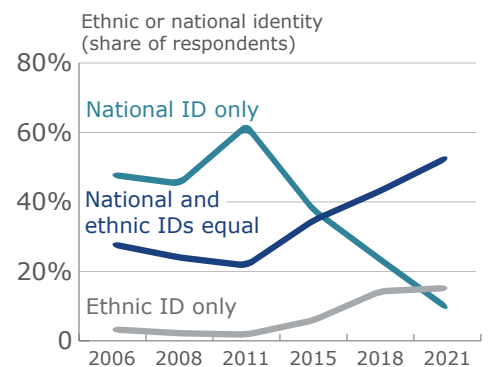
Respondents were asked: Let us suppose that you had to choose between being a South African and being a _____ [Respondent's ethnic group]. Which of the following statements best expresses your feelings? Note: Respondents who identify as "South African only" were excluded from this question.

Equal treatment under the law

It is concerning that an increasing share of respondents (63% in 2018) feel that people are often/always treated unequally under the law.

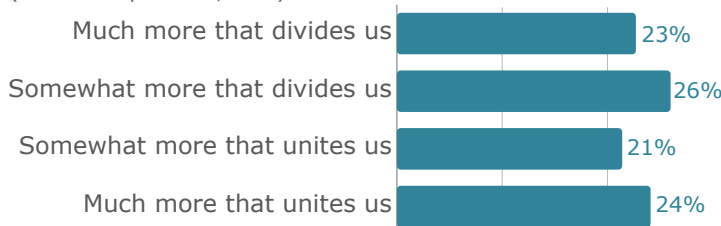


Respondents were asked: In your opinion, how often are people treated unequally under the law?



National unity or division

Is there more that divides or more that unites South Africans? (share of respondents, 2021)



Respondents were asked: South Africans are very diverse. They come from different religions, ethnic groups, political parties, and economic and social backgrounds. Overall, would you say that there is more that unites all South Africans as one people, or more that divides them?

Considering the diversity of social groups in SA, South Africans are relatively split about whether there is more that unites or divides us as a country. Close to one in four respondents (23%) say there is much more that divides than unites South Africans, but an equal share of respondents say there is much more that unites than divides (24%). This finding is in stark contrast to the 2019 South African Reconciliation Barometer data that suggests most respondents believe there is more that unites South Africans than divides them, but perhaps also speaks to the impact of the COVID-19 pandemic on social relations and material inequalities.

Notes: ¹ All data from Afrobarometer - a pan-African, non-partisan survey research network that provides reliable data on African experiences and evaluations of democracy, governance, and quality of life. The share of respondents who answered "Don't know" or "Refused" to any of the questions are not shown on the graphs. **Acknowledgements:** Mikhail Moosa, Institute for Justice and Reconciliation.

Priority 7: Working for a better Africa and World

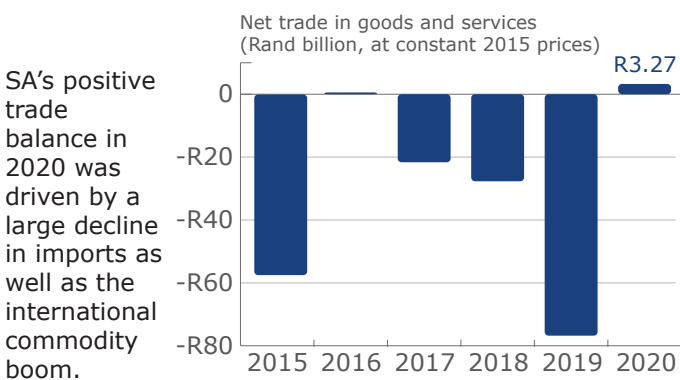
NDP Chapter 7: Positioning SA in the World

Positioning SA in the World

One of the structural reforms recommended by the ERRP is a need to re-orient trade policies and pursue greater regional integration to boost exports, employment and innovation. The economic effects of the COVID-19 pandemic added to the challenge of achieving these objectives. SA, however, has been playing an important role in motivating for the intellectual property rights on COVID-19 vaccines to be waived for developing countries in order to fast track access to jobs.

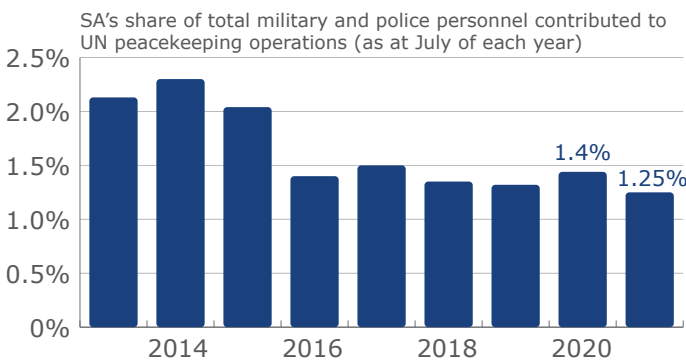
Trade between SA and the World

The COVID-19 pandemic led to a decline in SA's imports and exports as a share of GDP, but at the same time SA had a record terms of trade where the rise in export prices exceeded that of import costs.

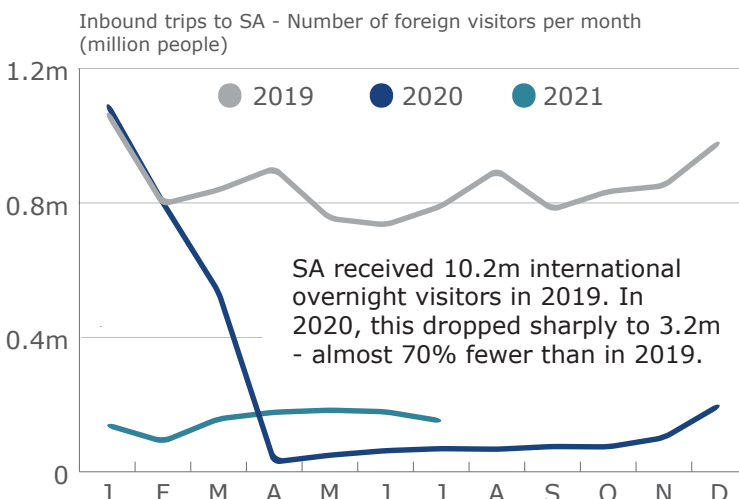


SA's positive trade balance in 2020 was driven by a large decline in imports as well as the international commodity boom.

Contribution to international peace and security

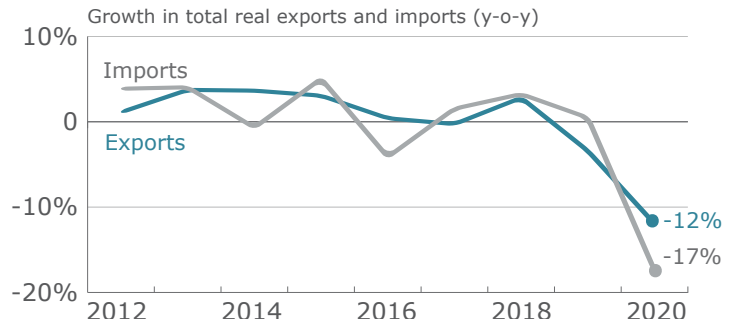


Impact of COVID-19 on SA's tourism trends



Notes: ¹ World Economic Forum (2020). The Global Competitiveness Report 2019 (p.19)

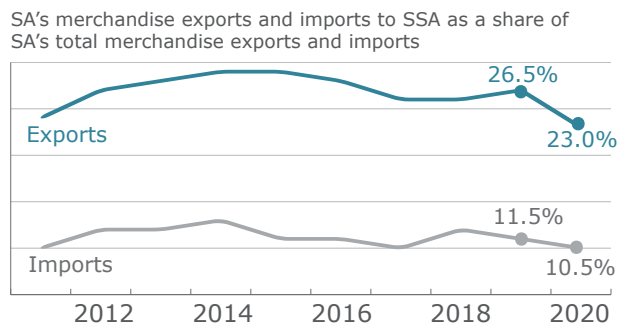
Acknowledgements: John Stuart, tralac associate.



The impact of the pandemic on growth in real imports and exports has been strongly negative. Imports fell more sharply than exports in 2020, reflecting the decline in spending during the pandemic and a sharply lower oil price.

SA's trade with Sub-Saharan Africa (SSA)

SA's share of total trade with SSA followed an upward trend throughout the 2000s, peaking in 2014. 2020 saw a drop of 3.5%pts in the share of SA's exports to SSA, and a drop of 1%pt in the share of SA's imports from SSA. The African Continental Free Trade Agreement (AfCFTA) was launched on 1 January 2021 and may bring new opportunities for higher levels of trade with SSA.



SA's global competitiveness

SA's better rank on the WEF's Global Competitiveness Index is attributed to a restored balance of powers across state entities, enhanced administrative efficiency of the public sector, and improved corporate governance. Yet, a lack of transparency and government adaptability to change, low business dynamism due to insolvency regulation and the administrative burden of starting a business, and insufficient labour market flexibility remain among the main constraints.¹



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Building a capable state

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Most common types of corruption	<i>Ibid.</i>
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Perceptions of police involvement in corruption	<i>Ibid.</i>

Transforming society and uniting the country

Trust in other groups	Afrobarometer Round 8 survey in South Africa, 2021, Compiled by Plus 94 Research and the Institute for Justice and Reconciliation.
Strength of national identity	<i>Ibid.</i>
Equal treatment under the law	<i>ibid.</i>
Ethnic or national identity	<i>ibid.</i>
National unity or division	<i>ibid.</i>

Positioning SA in the World

SA's imports and exports as % of GDP	World Development Indicators, World Bank
Trade between SA and Sub-Saharan Africa (SSA)	Author's calculations on Trade Map (ITC) data.
Growth in total real exports and imports	BER, own calculations
Annual change in exports & imports	World Development Indicators, World Bank
SA military and police personnel contributed to UN peacekeeping operations	United Nations
Foreign tourist arrivals	Stats SA
SA's Ranking on the Global Competitiveness Index	World Economic Forum; The Global Competitiveness Report 2019

