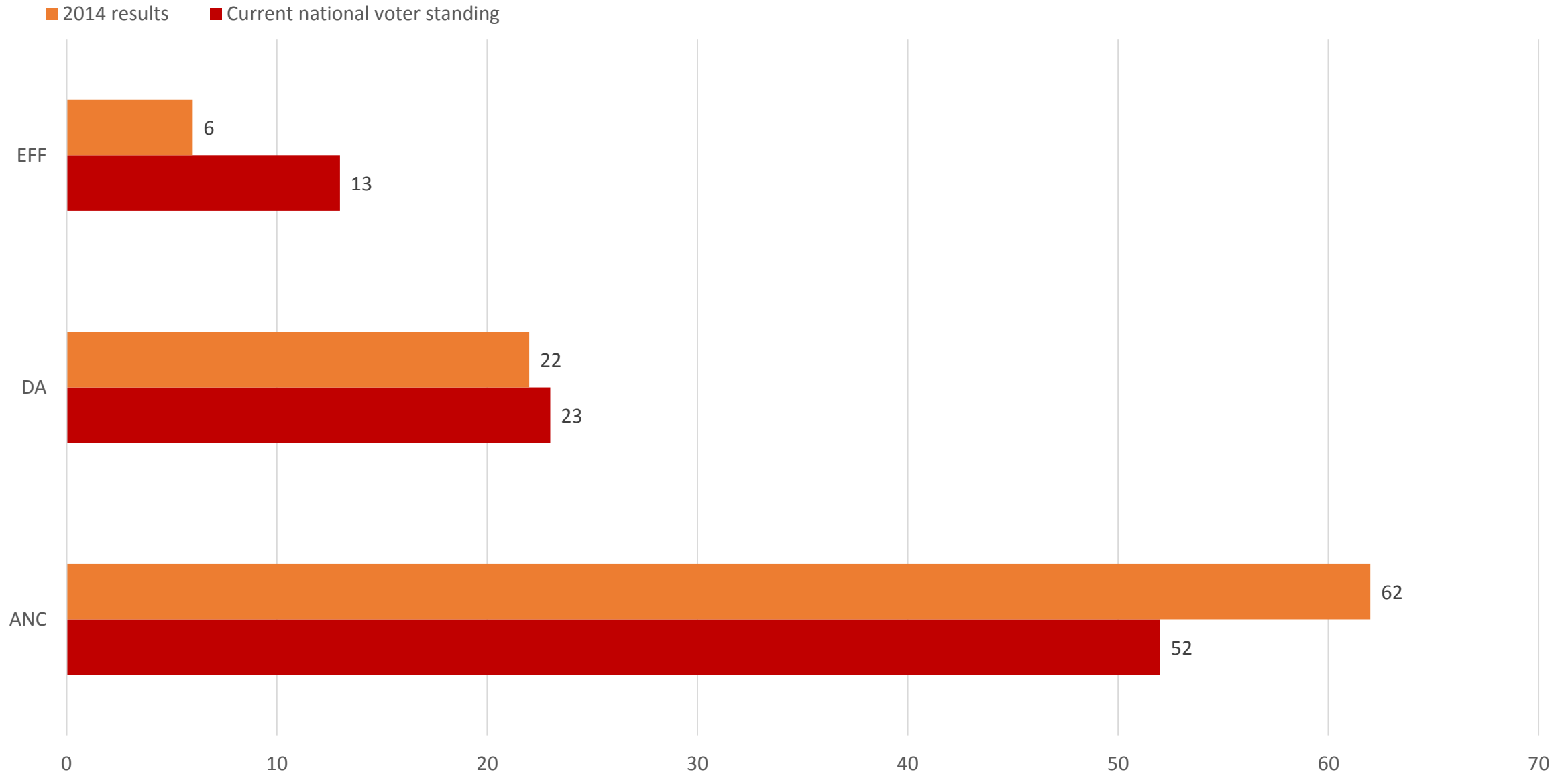


South Africa to 2030

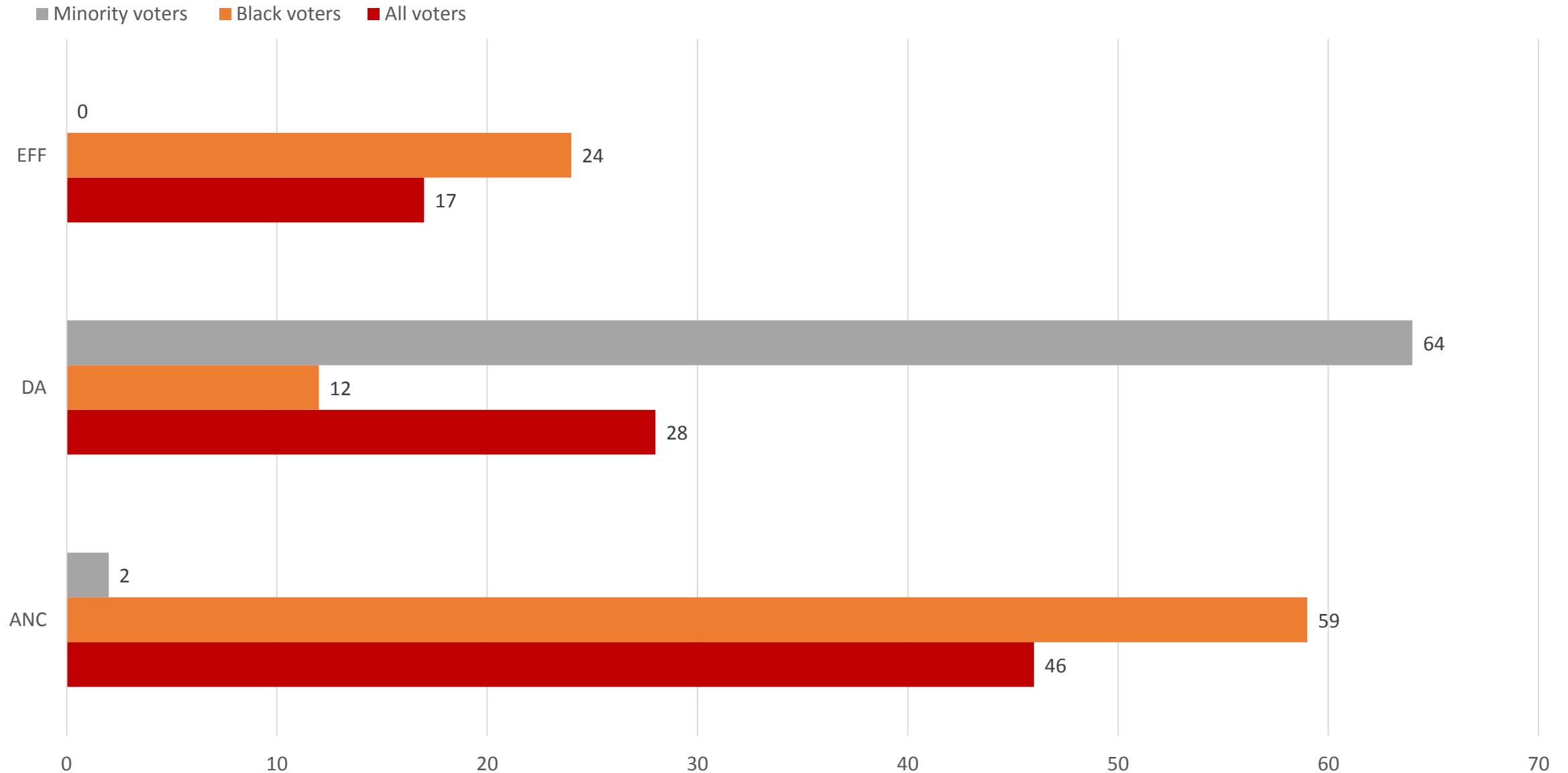
A strategic intelligence briefing

Frans Cronje – 2018

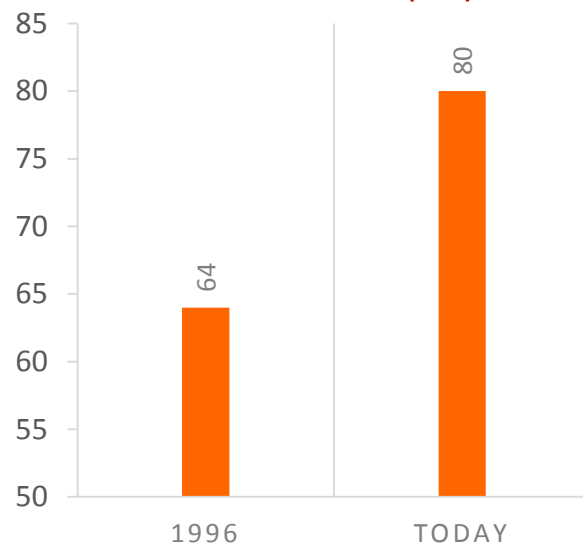
Current voter preferences RSA – not a forecast



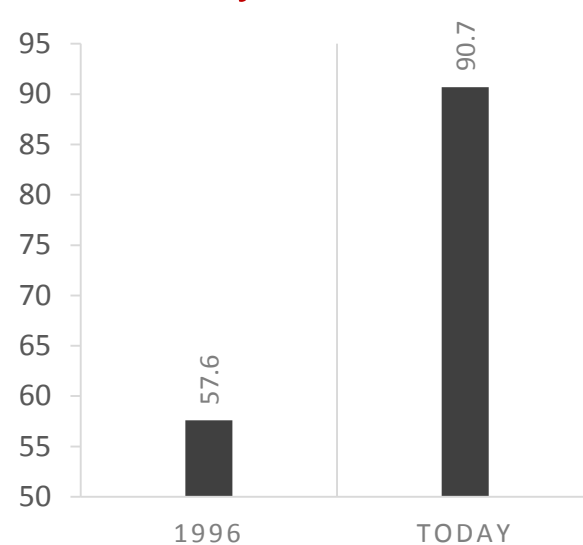
Current voter preferences Gauteng – not a forecast



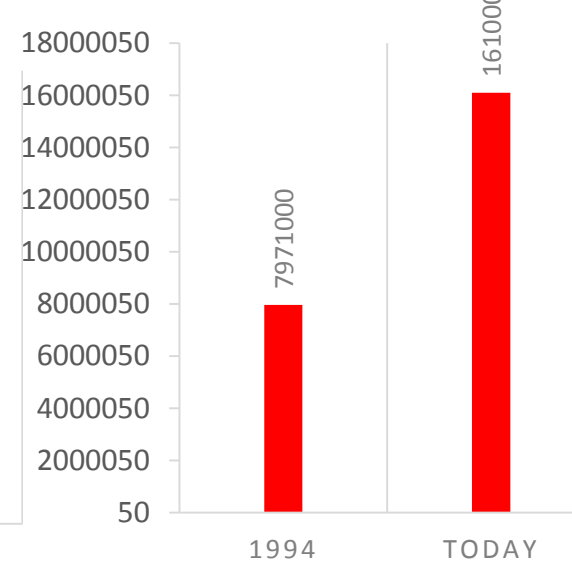
Formal houses (%)



Electricity

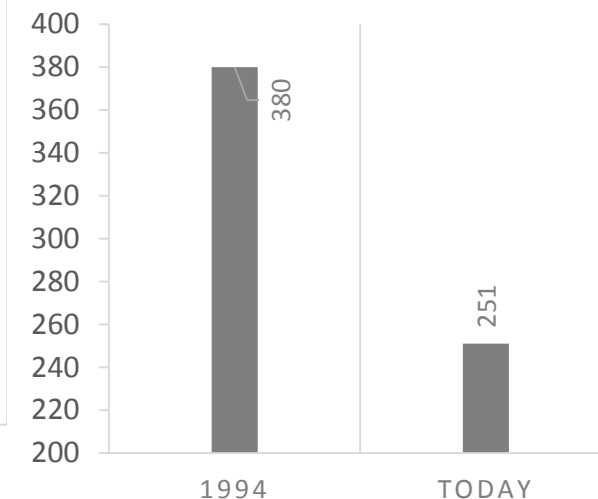


Jobs

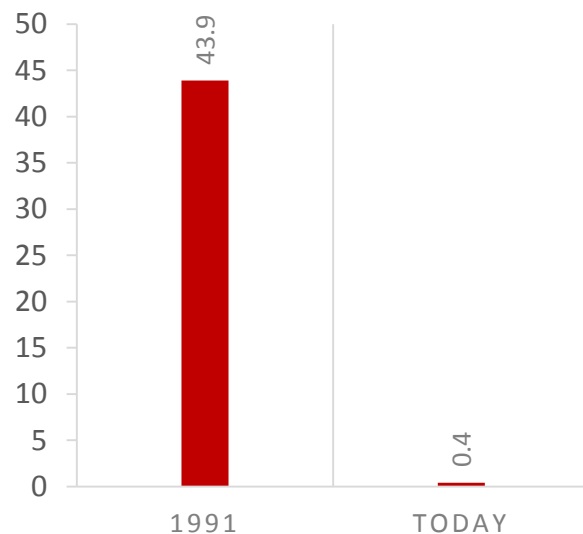


EDR

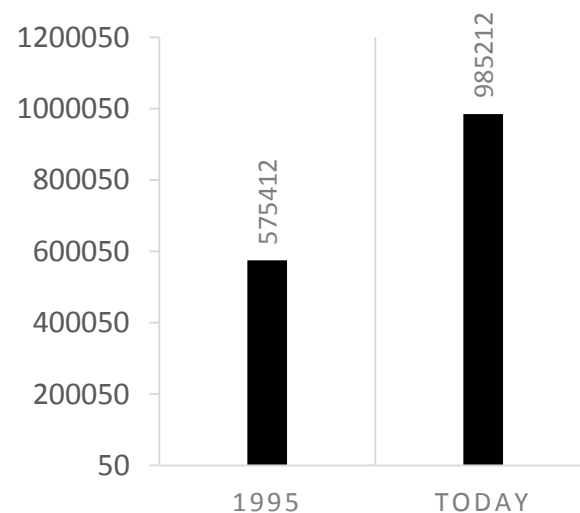
(not working/100 employed)



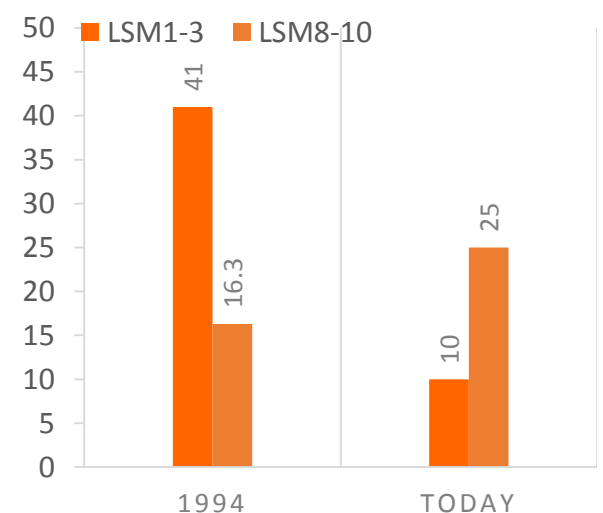
W:B engineer grads



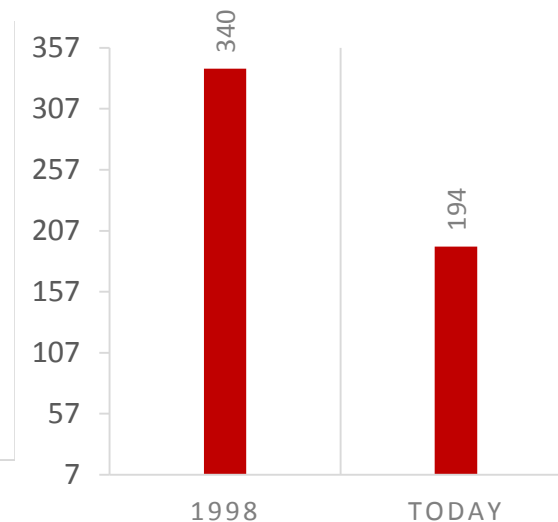
Students



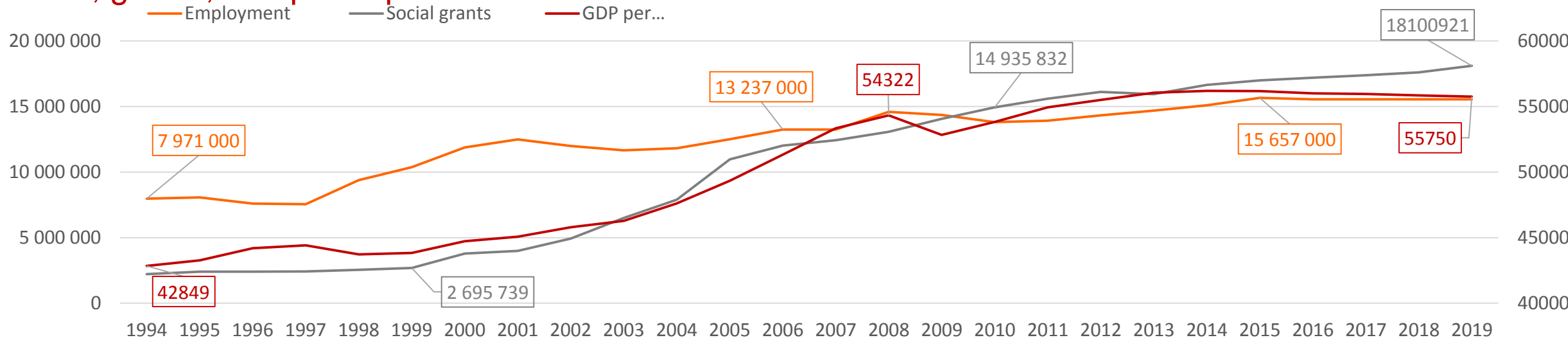
LSMs



People:nurse



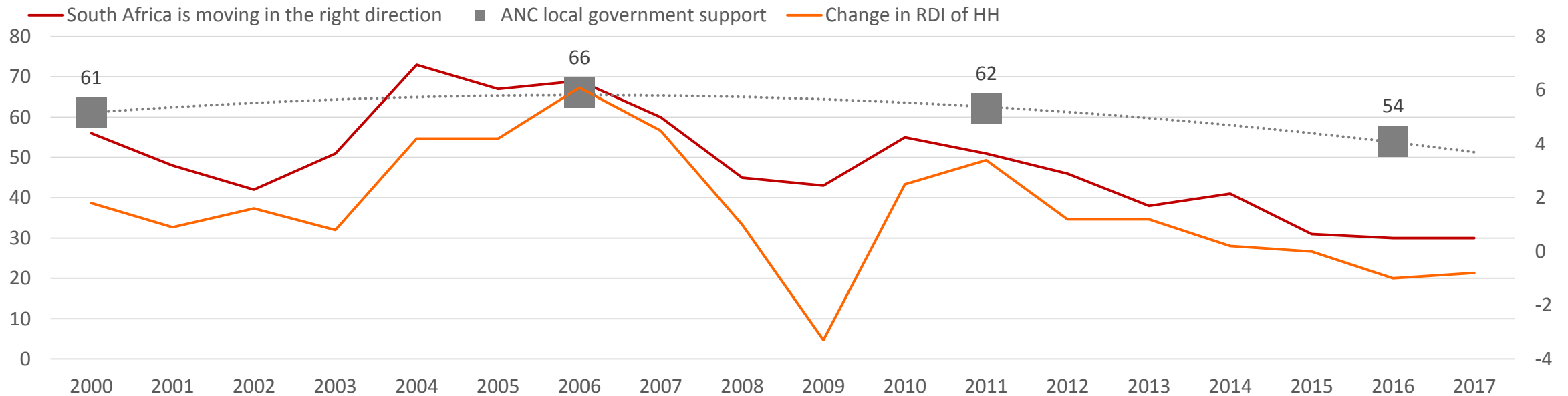
Jobs, grants, and per capita GDP 1994-2019



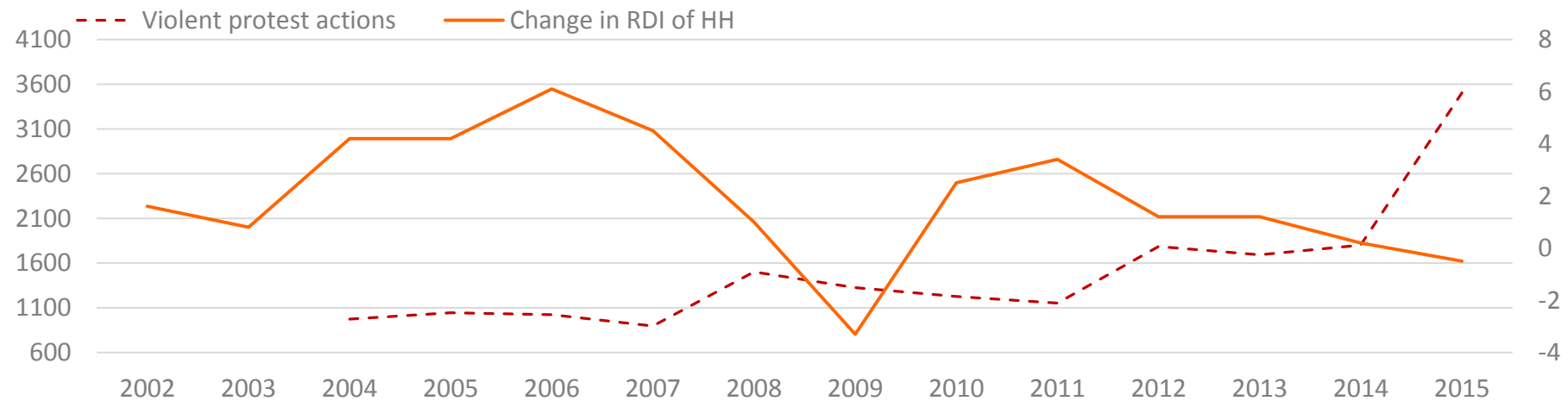
Key economic drivers



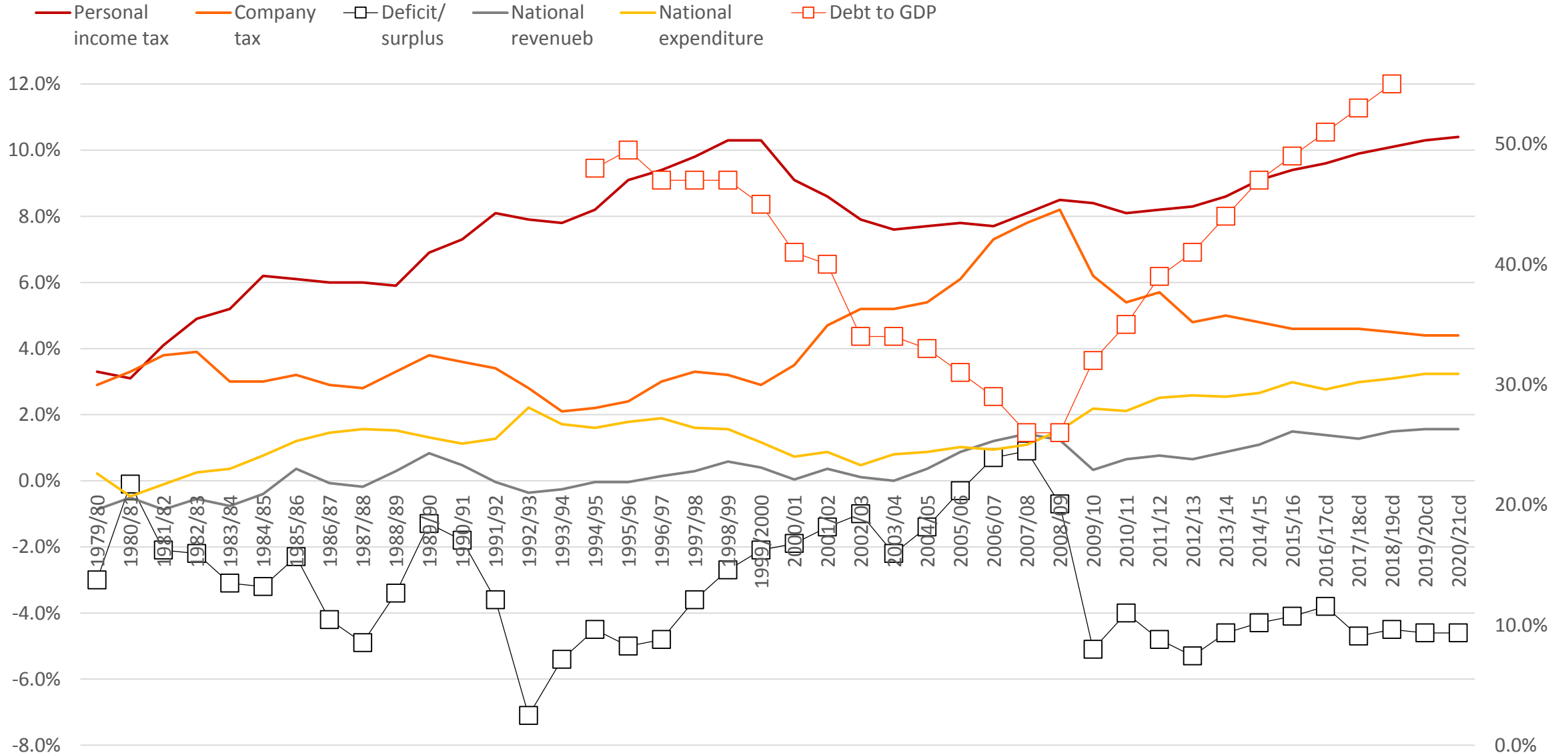
Popular confidence, ANC support, and RDI 2000-2017



Protest action and HH RDI



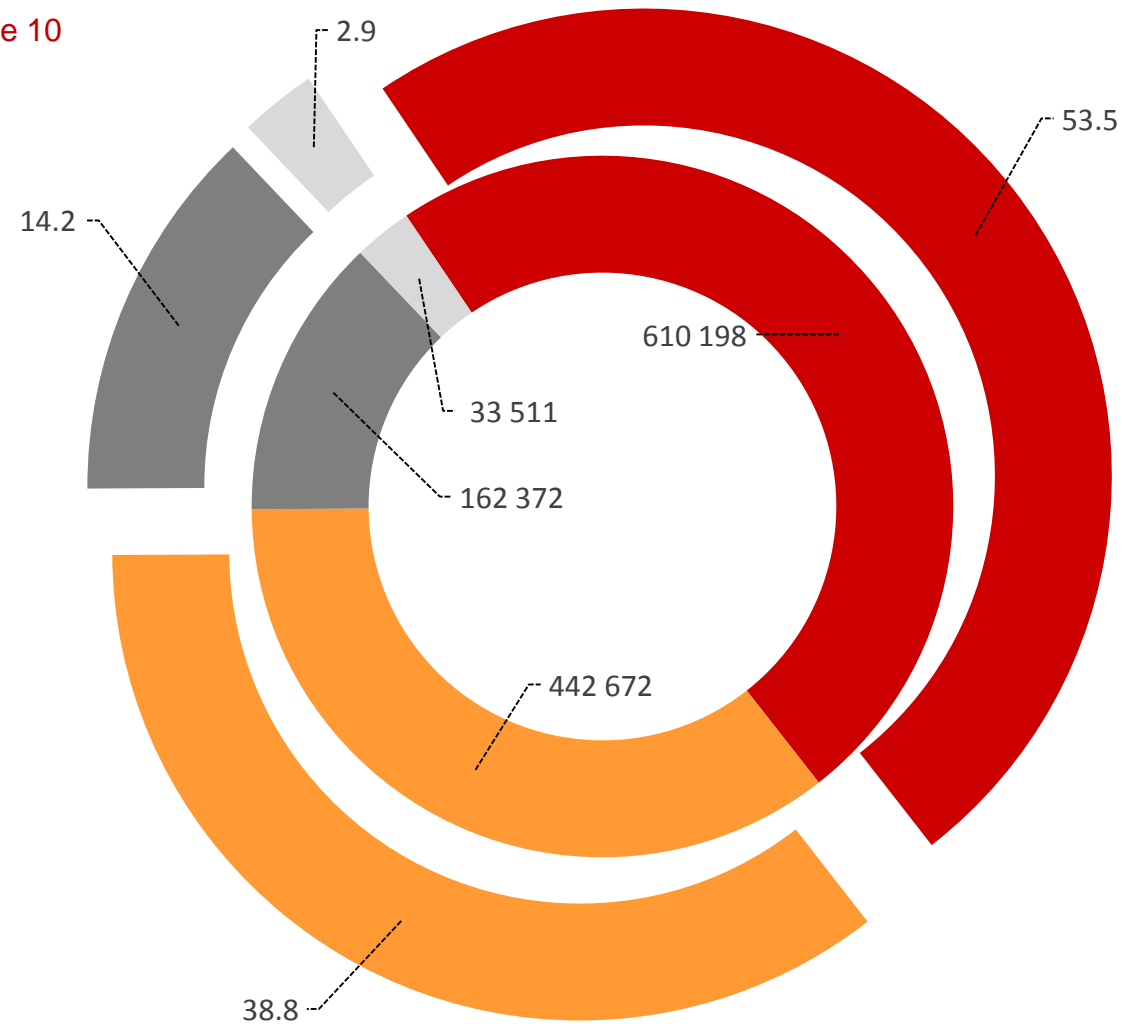
Government finances 1979 projected to 2021



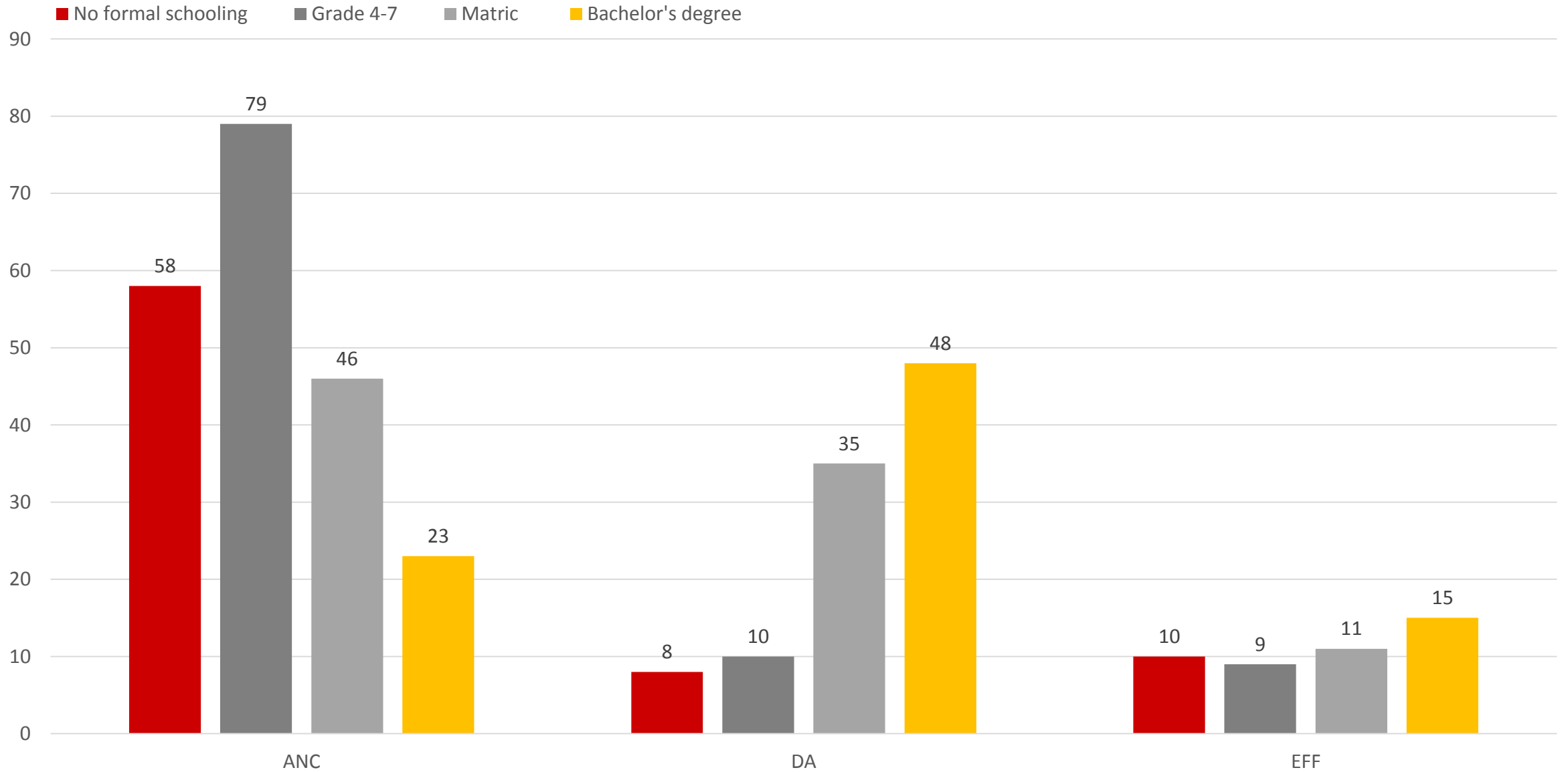
School performance based on 2014 grade 10 class*

■ Matric candidates 2016 ■ Passes 2016 ■ Bachelors passes ■ Maths passes 60%+

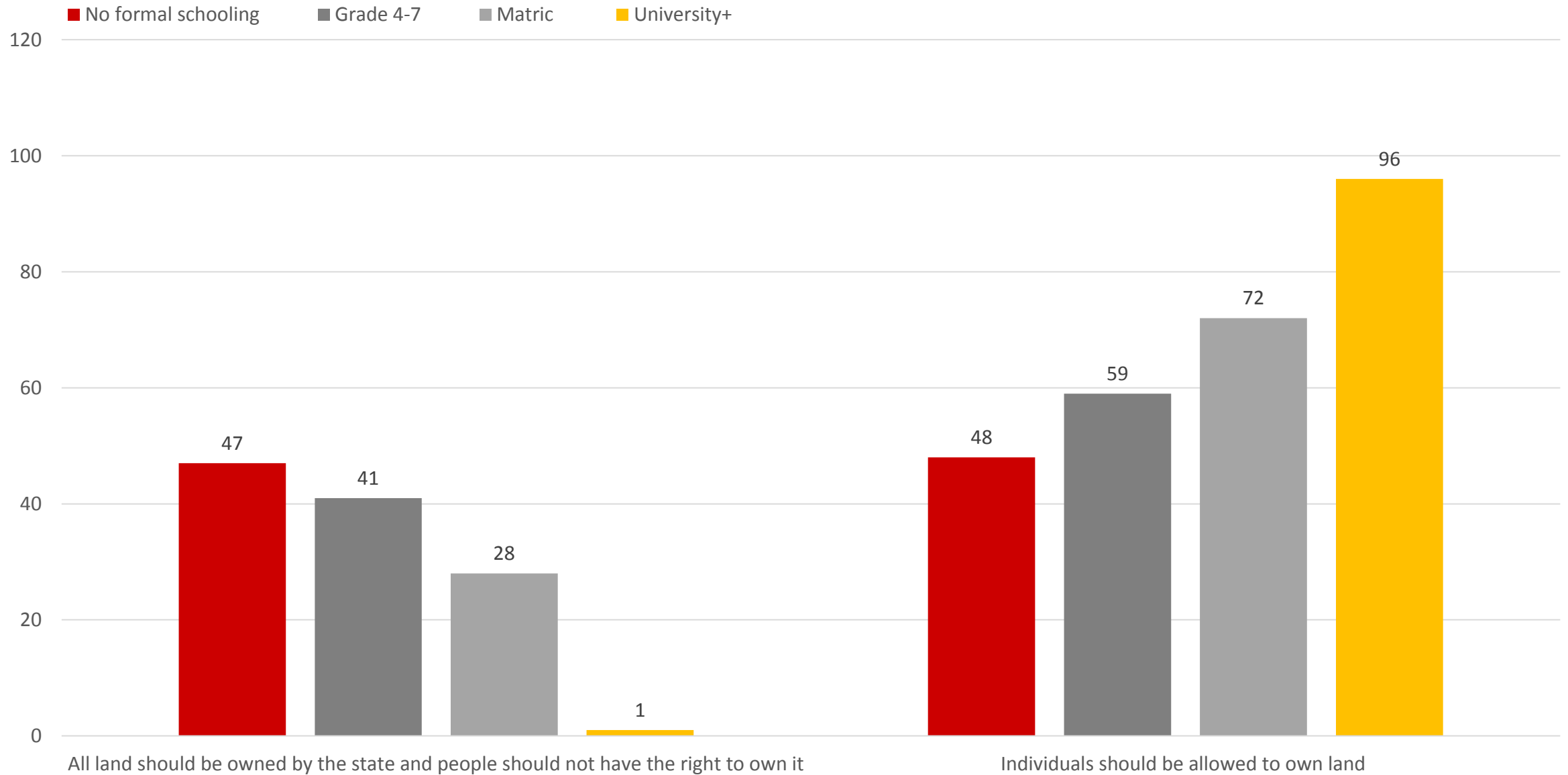
*there were 1 139 872 pupils in the grade 10 class of 2014



Who would you vote for?



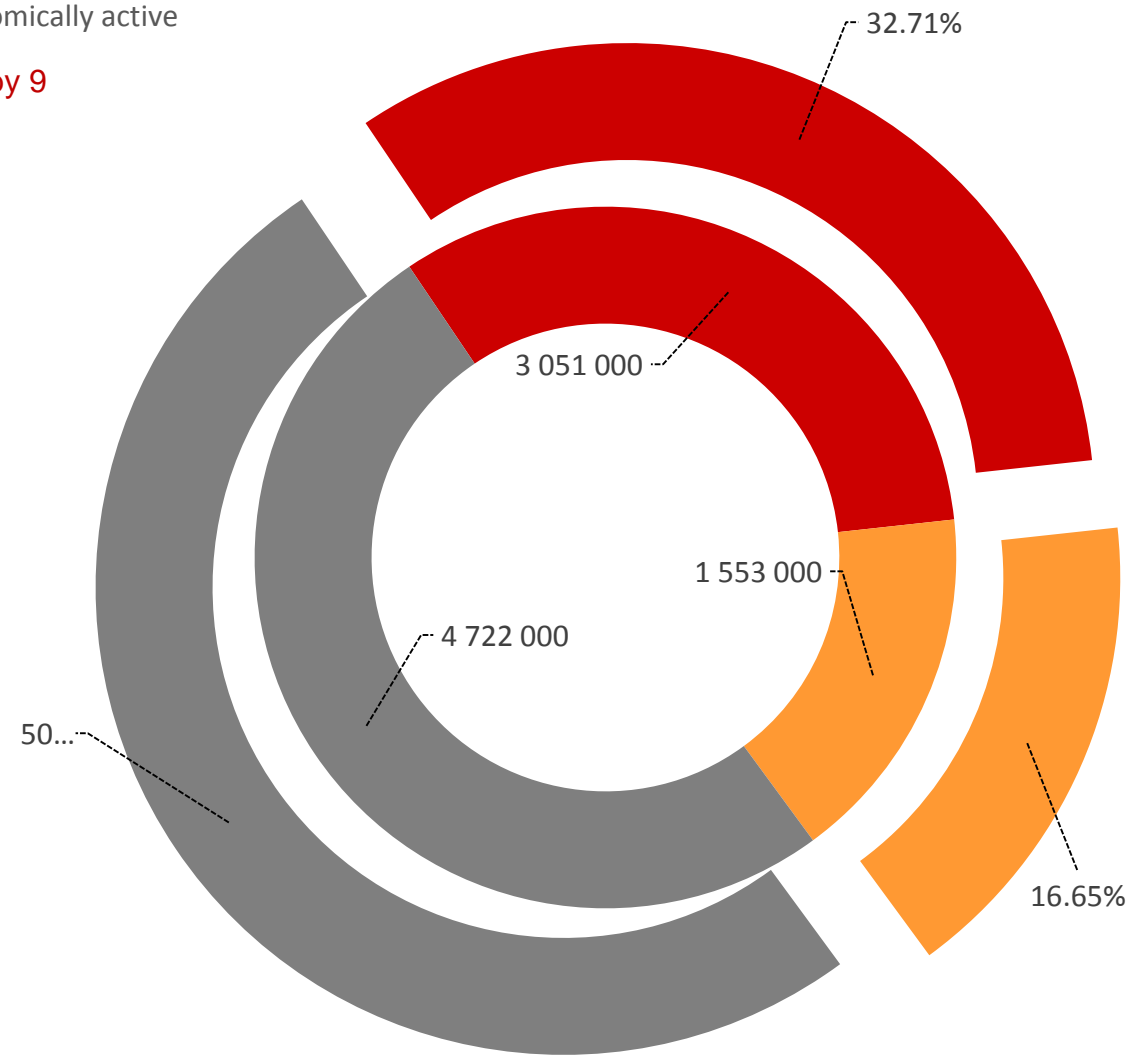
Perceptions of property rights



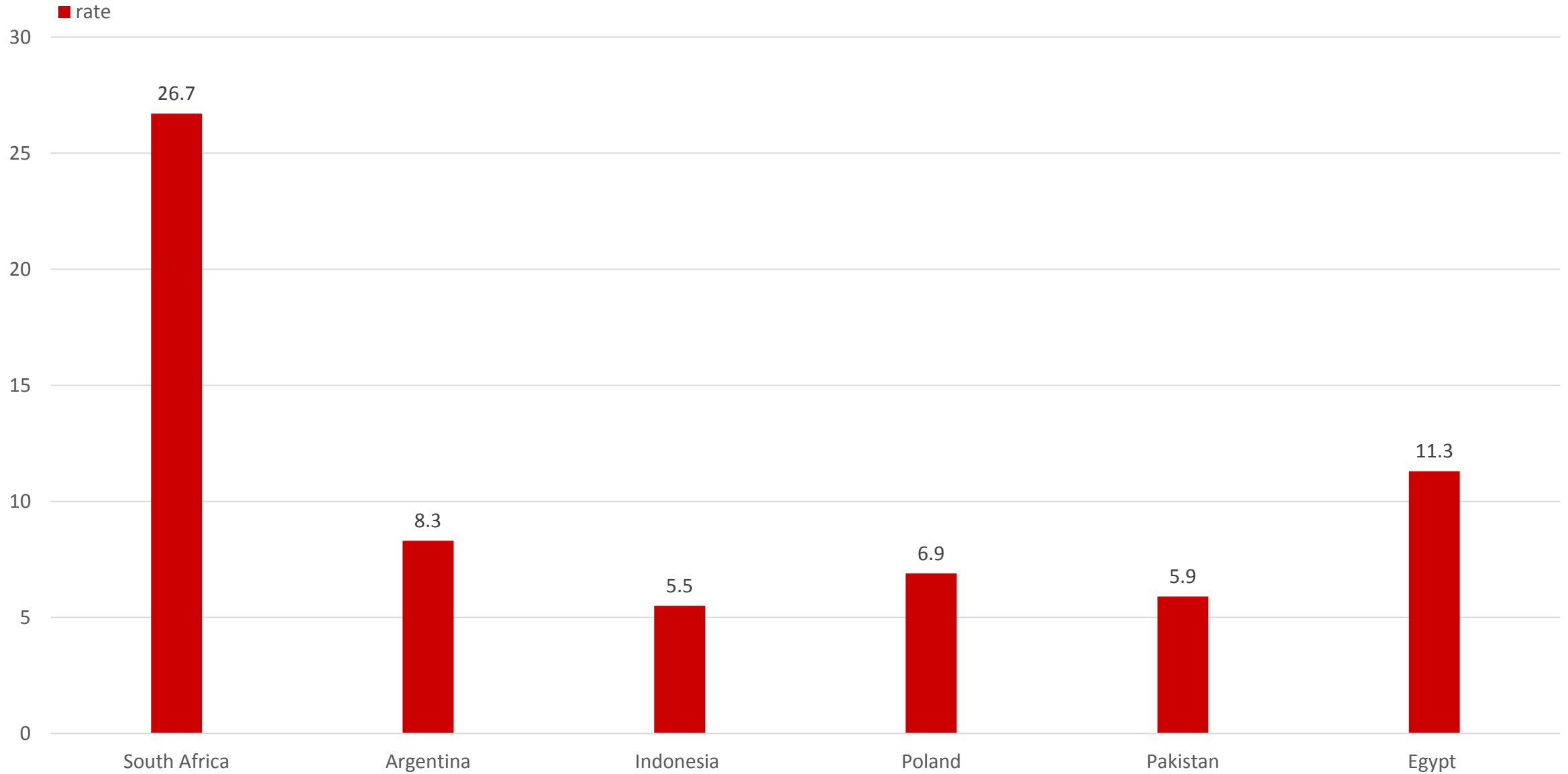
Labour market entrants post 2001*

■ Employed ■ Unemployed ■ Not economically active

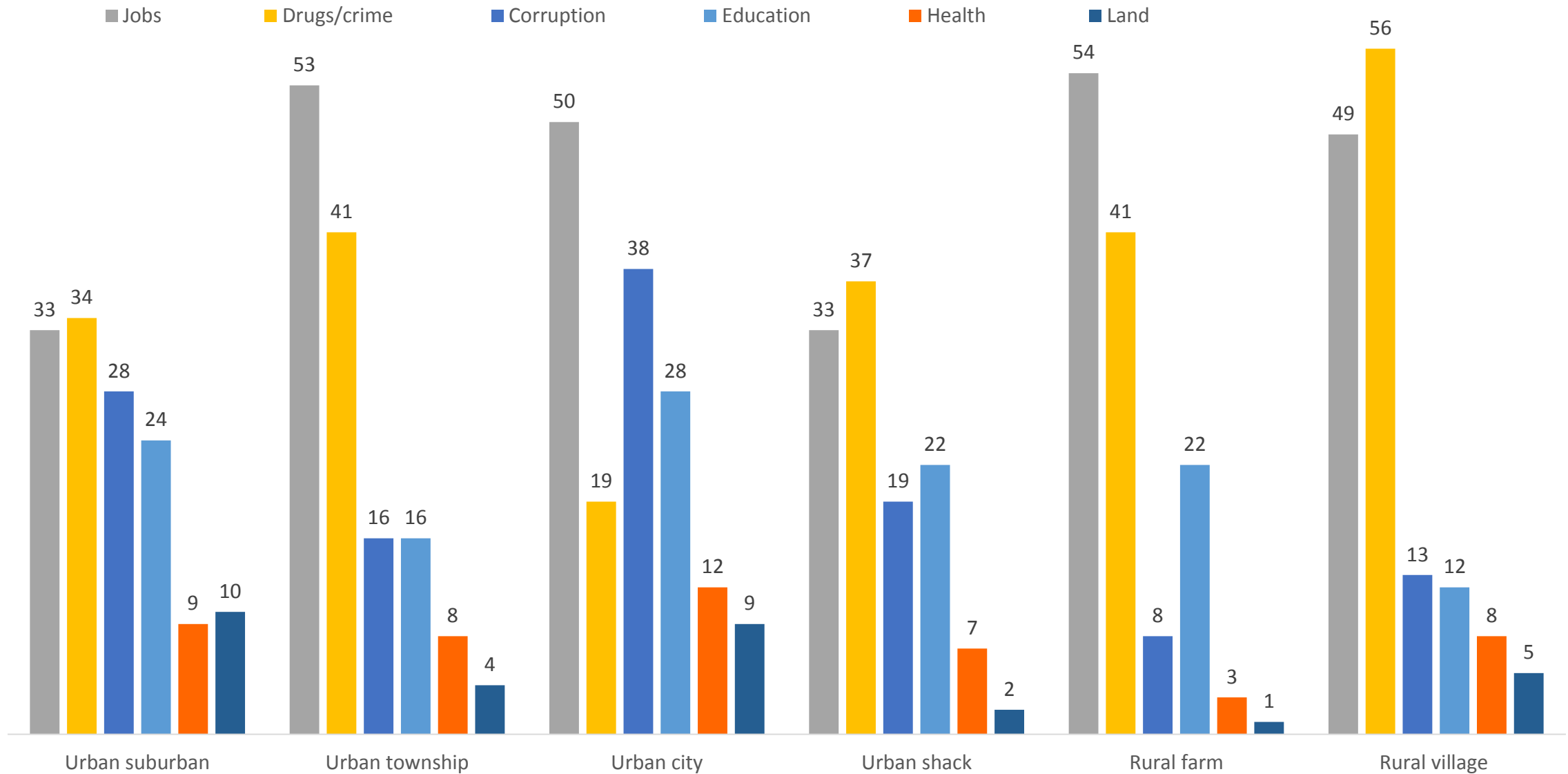
*the working age population increased by 9
326 000 since 2001



Comparative unemployment rates

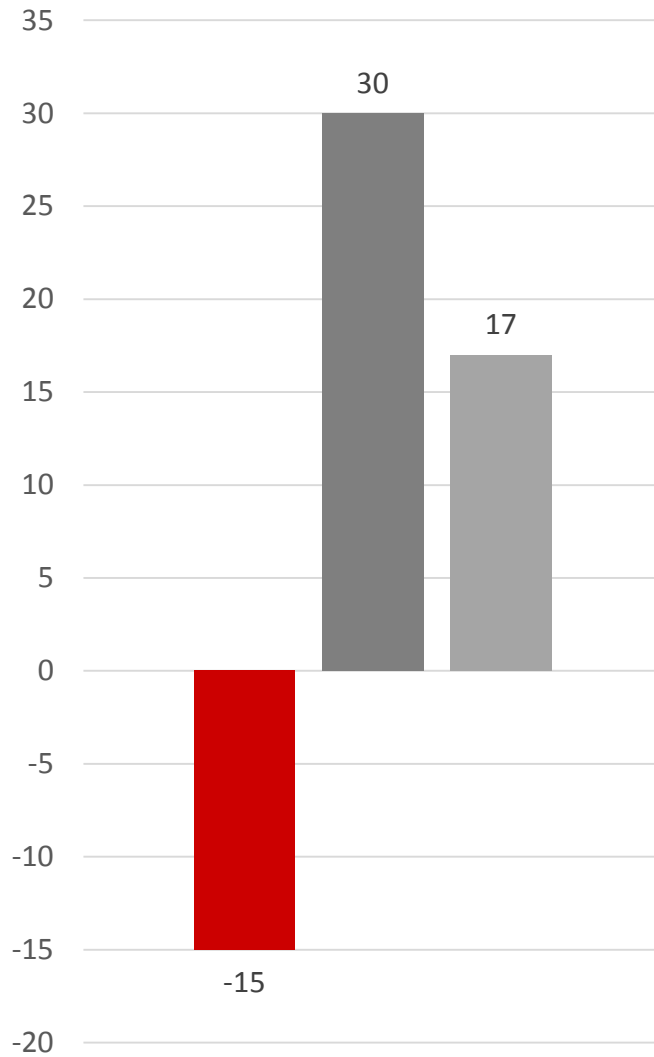


Major issues for government to address



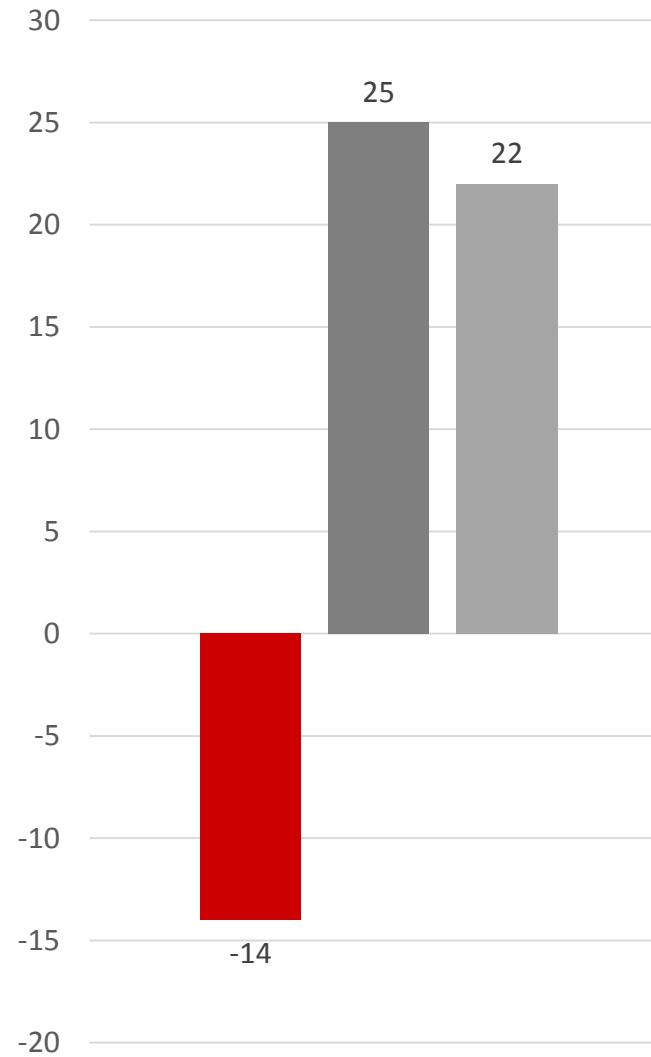
MP shifts 2004-2009

■ ANC ■ Cope ■ DA



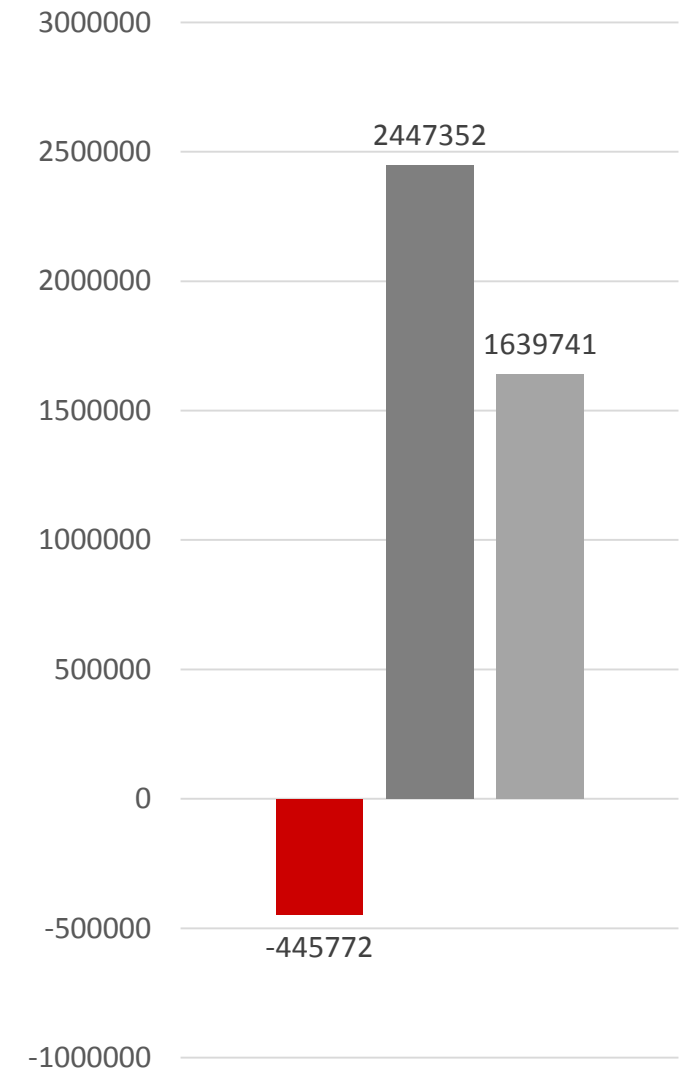
MP shifts 2009-2014

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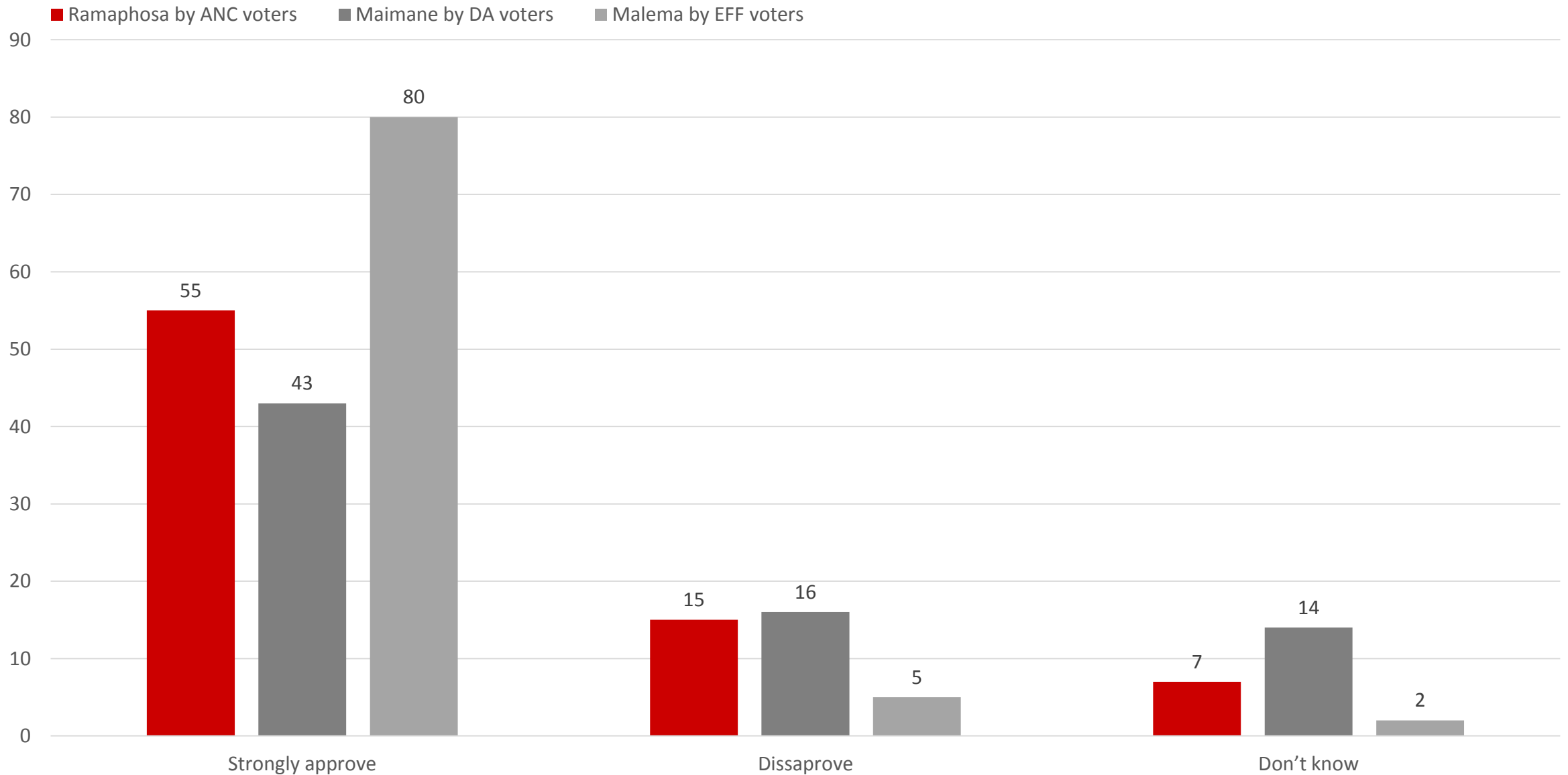


LG vote shifts 2011-2016

■ ANC ■ EFF ■ DA



Leadership perceptions



Structural reform

Rise of the Right

- 2024 ANC defeat seems inevitable
- Internal leadership rebellion
- Pragmatism trumps ideology
- Civil rights traded for stability
- Growth and investment recovery

Rise of the Rainbow

- Popular mandate for structural reform
- Anti-investment hostility dissipates
- Rule of law strongly in evidence
- Private sector driven recovery
- Rapid uptick in FDI, trade etc

Civil rights erosion

Tyranny of the left

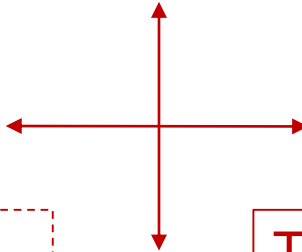
- Populist fervour deepens
- Reformists ejected
- Ideology trumps pragmatism
- Steep economic deterioration
- Racial nationalist authoritarianism

Civil rights culture

The Break-up

- Contested politics and instability
- Contradictory policy
- Relative economic underperformance
- Societal fragmentation and enclave formation

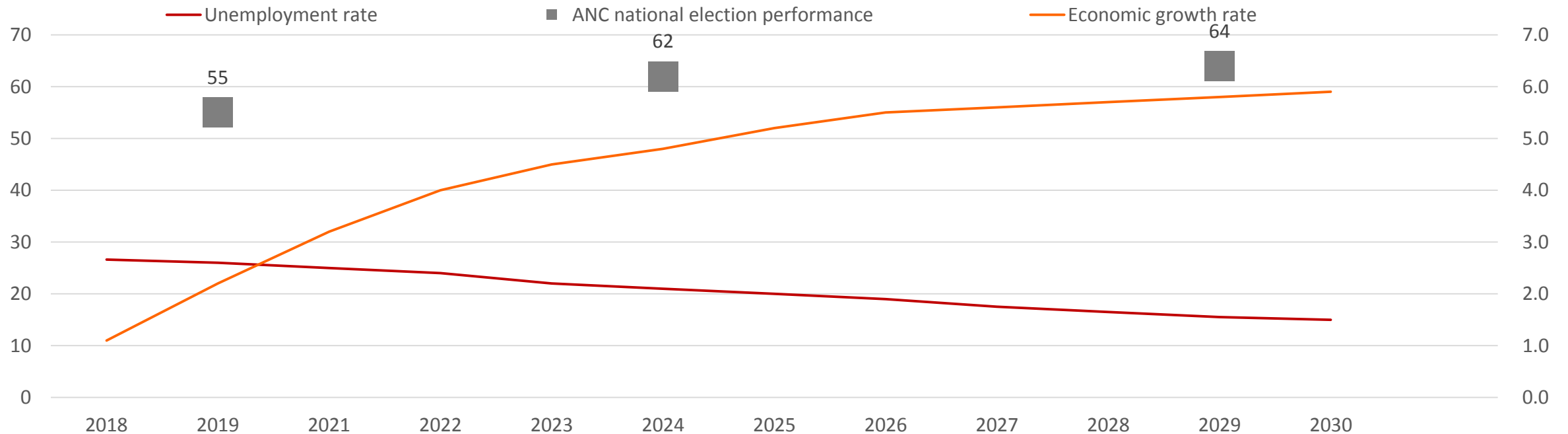
Structural deterioration



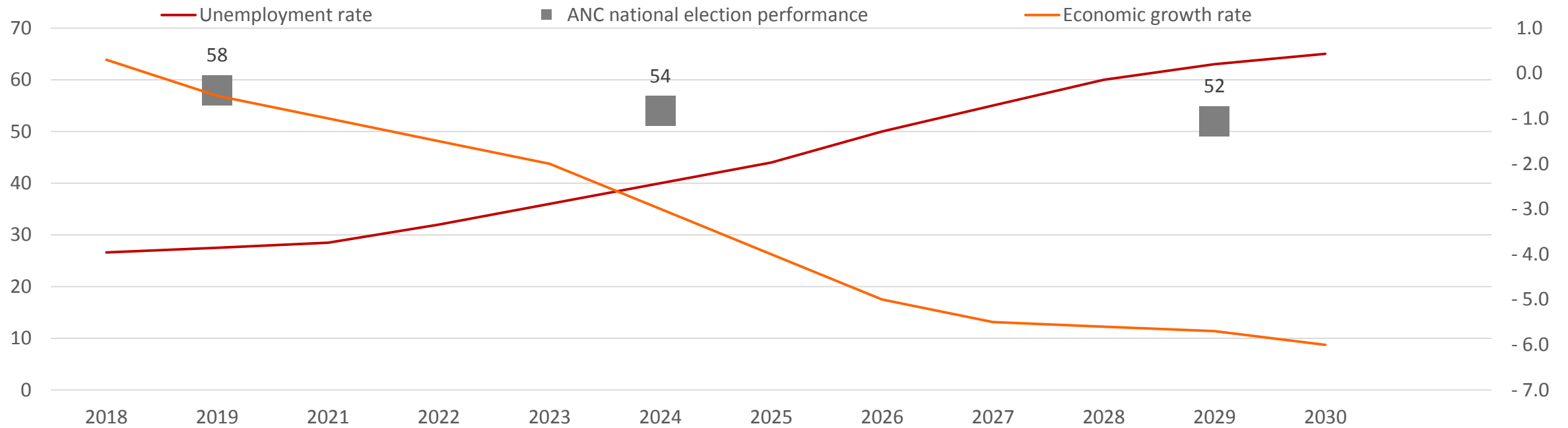
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South Africa 2018-2030



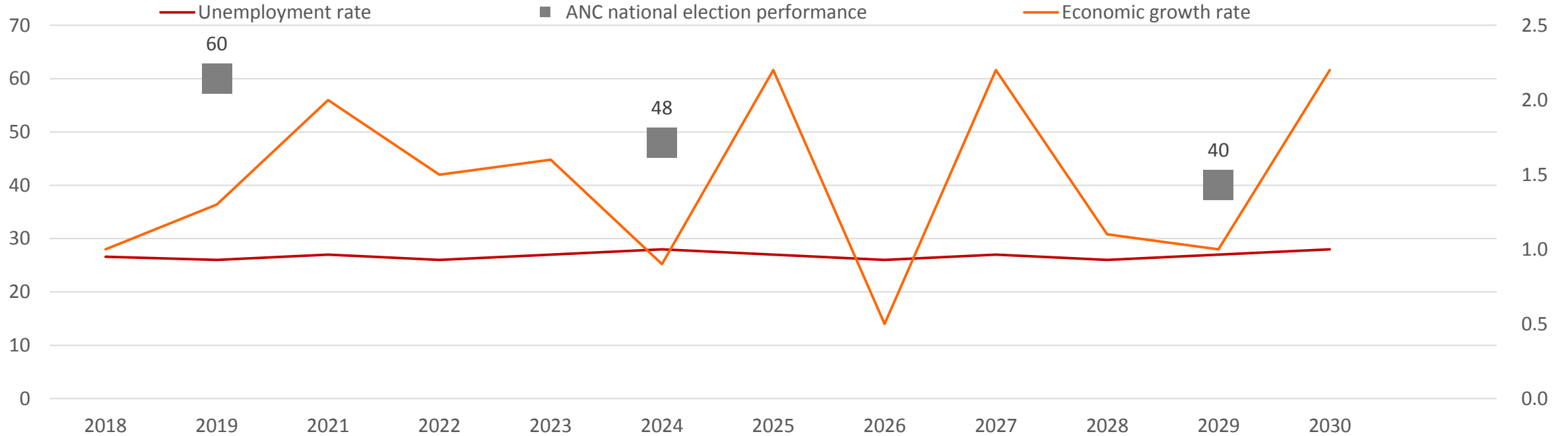
South Africa 2018-2030



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South Africa 2018-2030



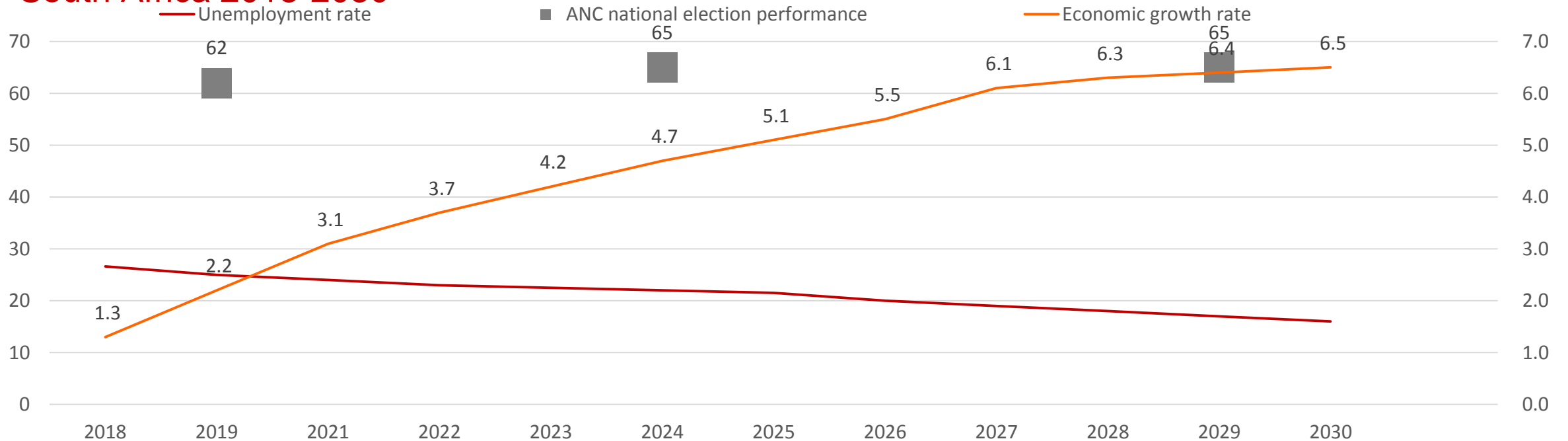
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South Africa 2018-2030



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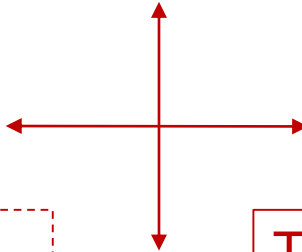
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Structural deterioration



South Africa to 2030

A strategic intelligence briefing



We supply reports, WA notes, conference calls, face to face consultations, and formal briefings on all strategic intelligence matters.

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