



PROSPECTS FOR REFORM

OR

POLITICAL REALIGNMENT

in South Africa's next decade

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CRA

Centre For Risk Analysis



August 2021

1 The political survival of the ANC

2 Public opinion in SA

3 Broader political trends

4 Structural constraints on reform

5 Eskom and its implications

6 The economic outlook

7 Living standards drivers

8 Schools and employment

9 Scenarios

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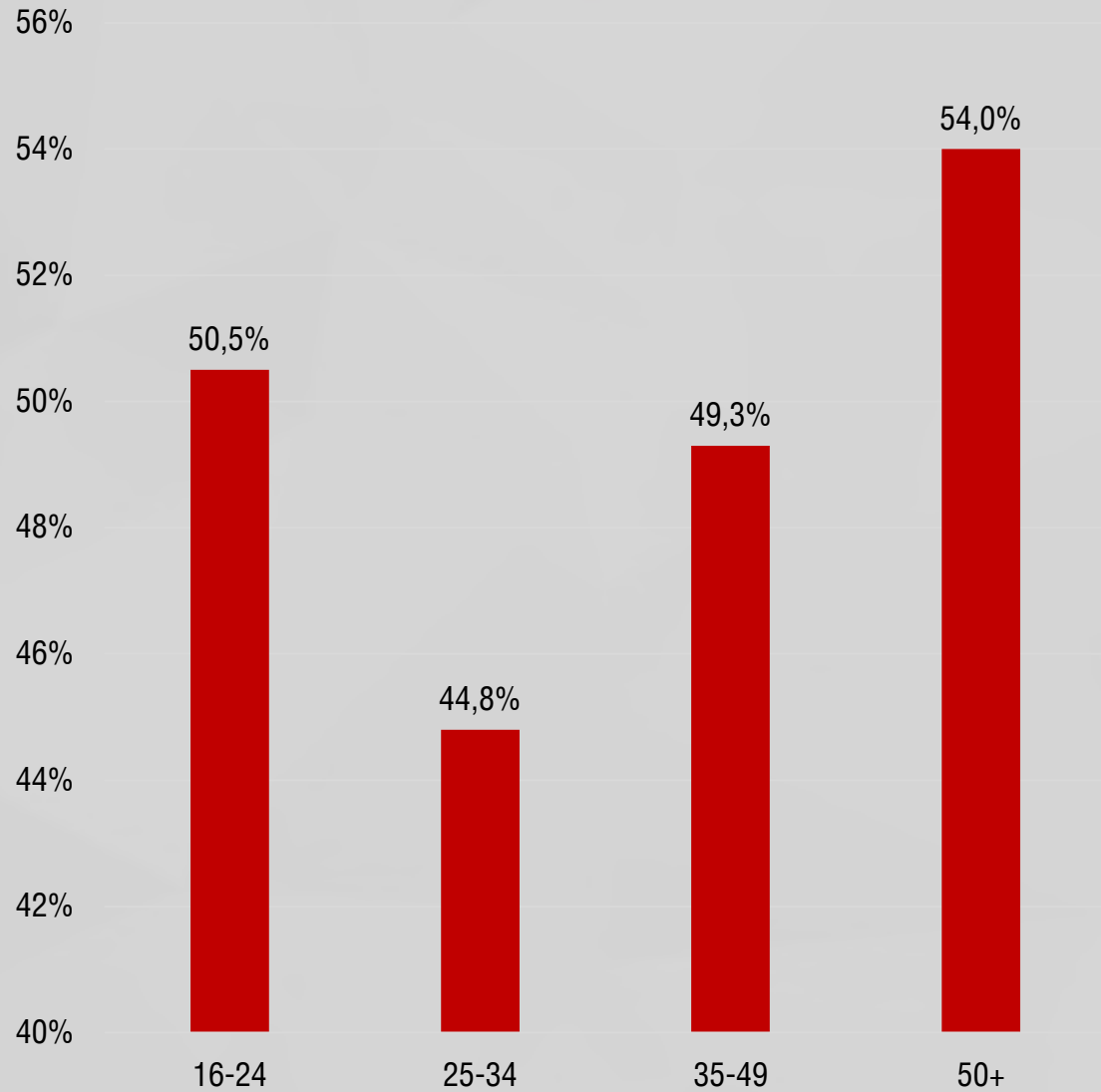
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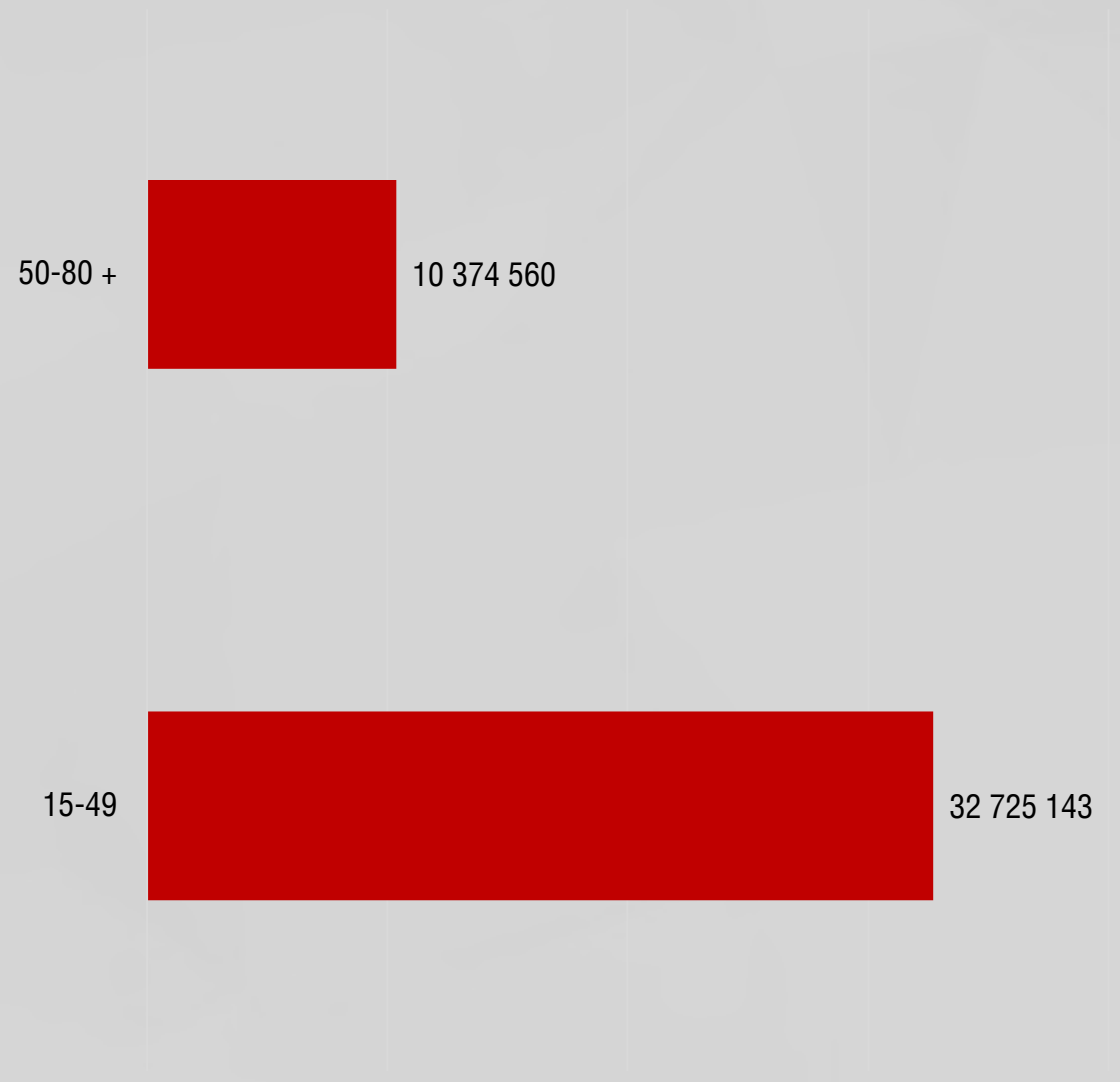
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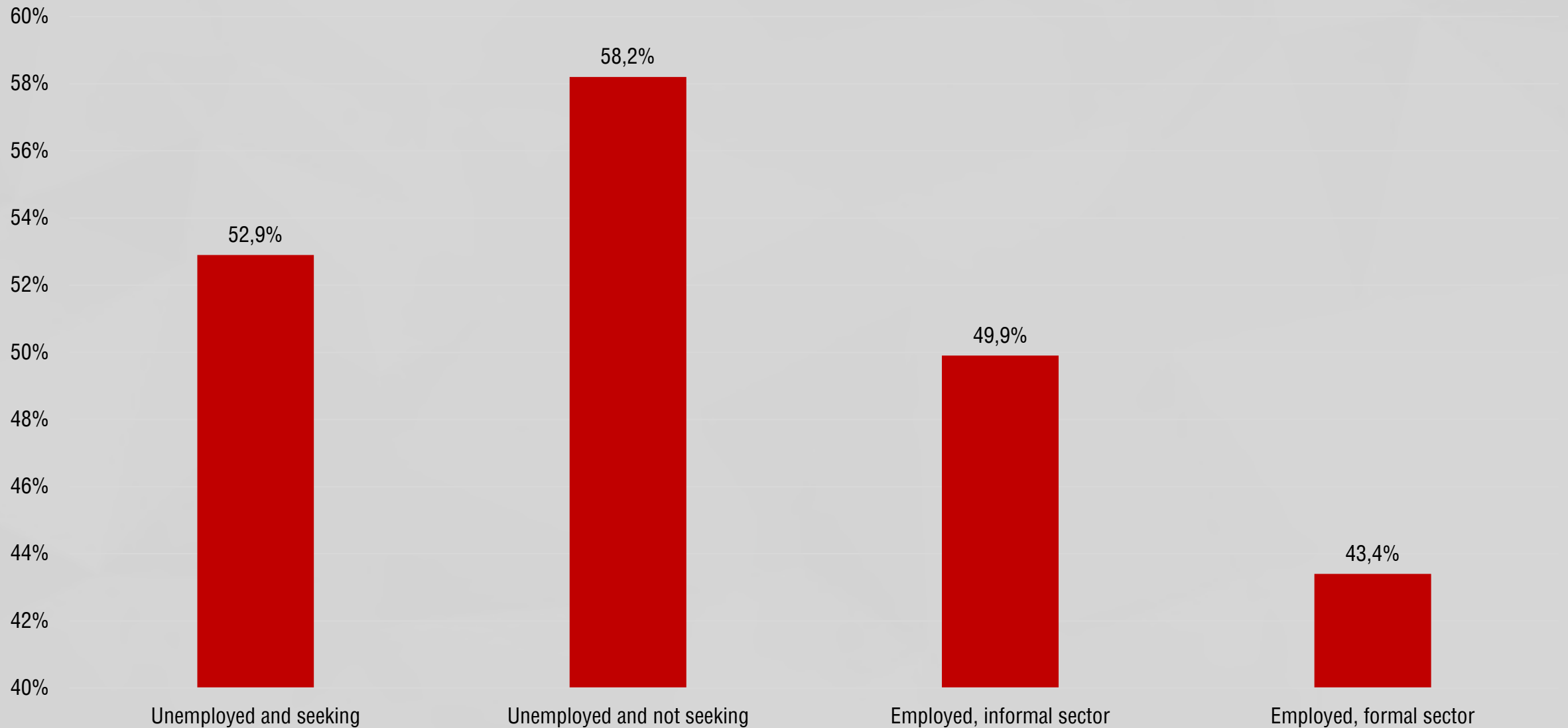
ANC support by age group, 2020



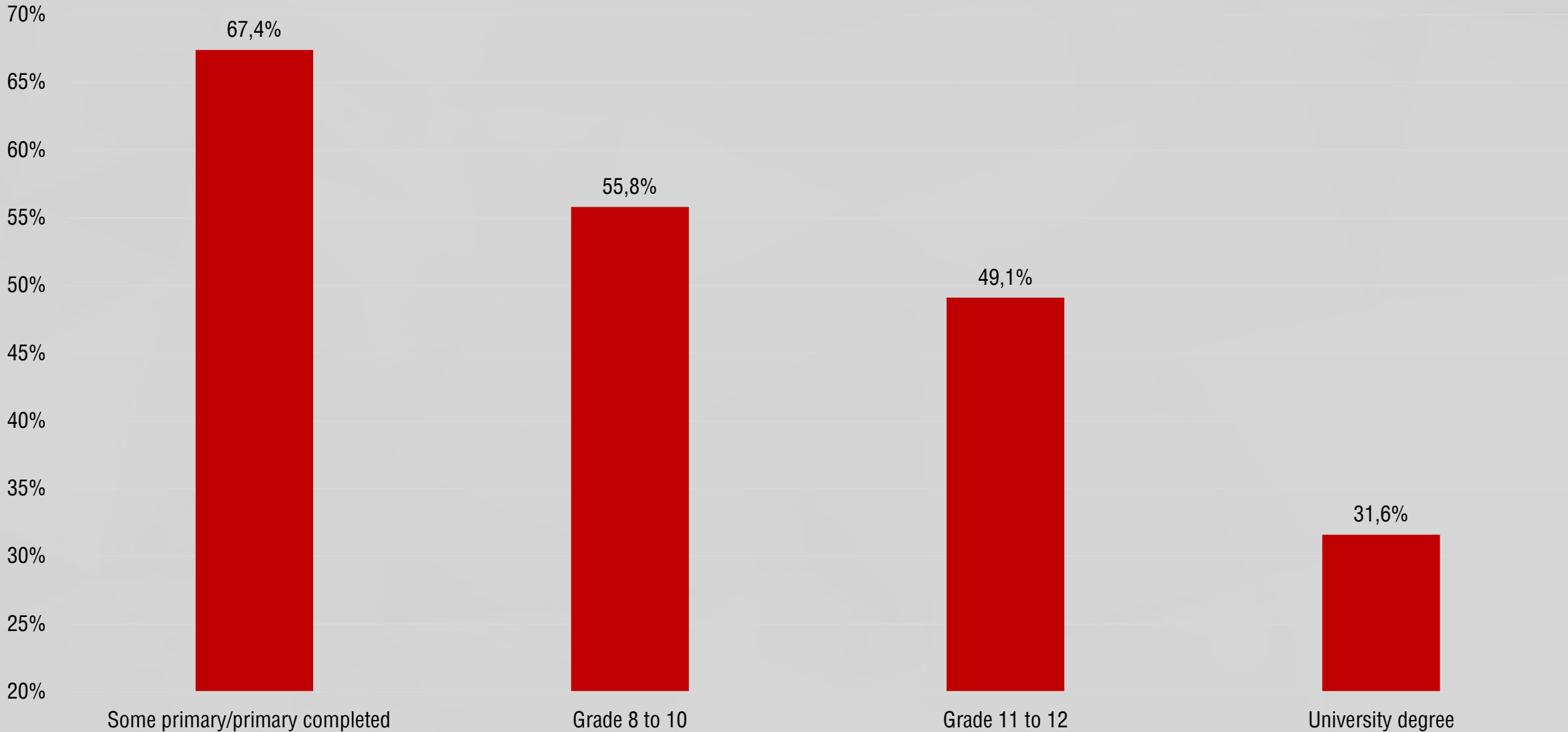
South Africa population estimates, 2021



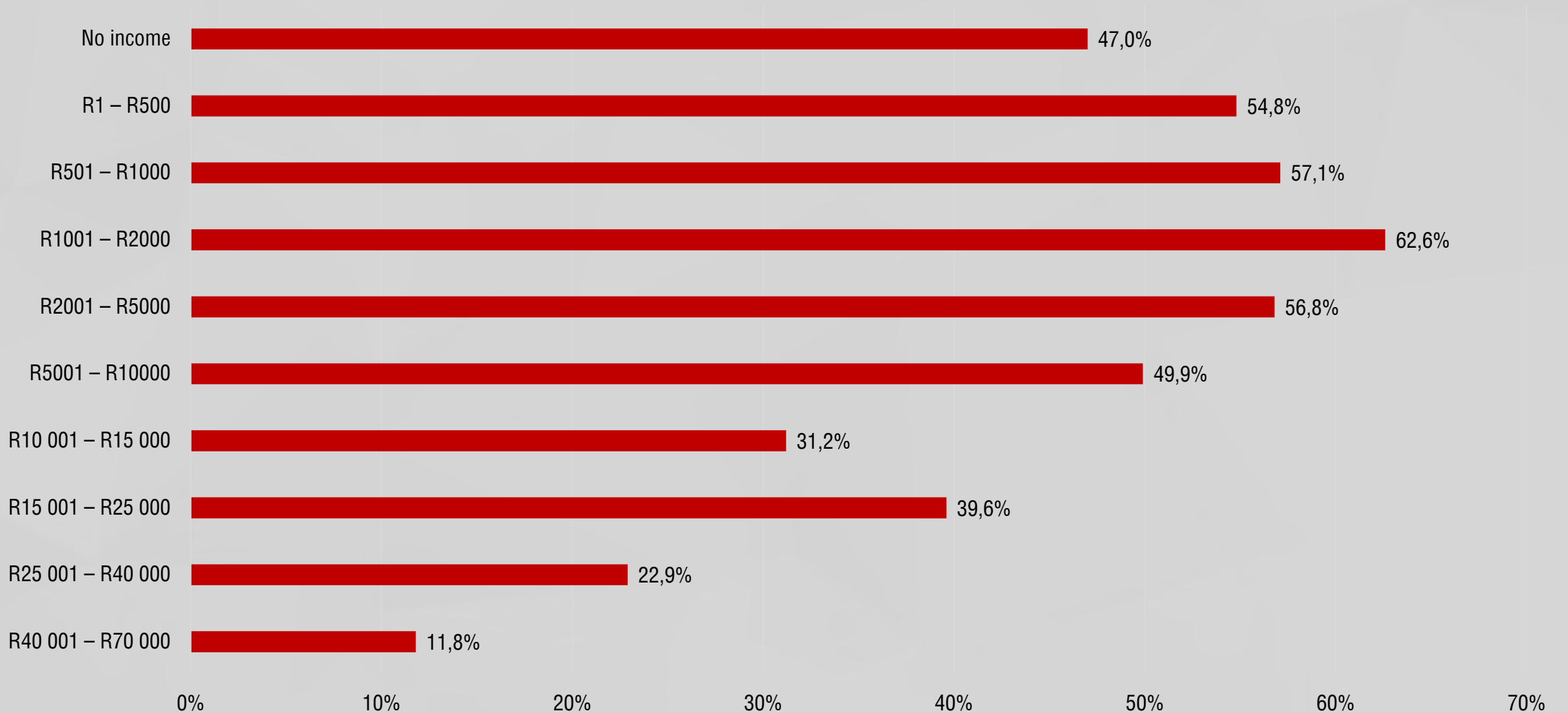
ANC support by employment status, 2020



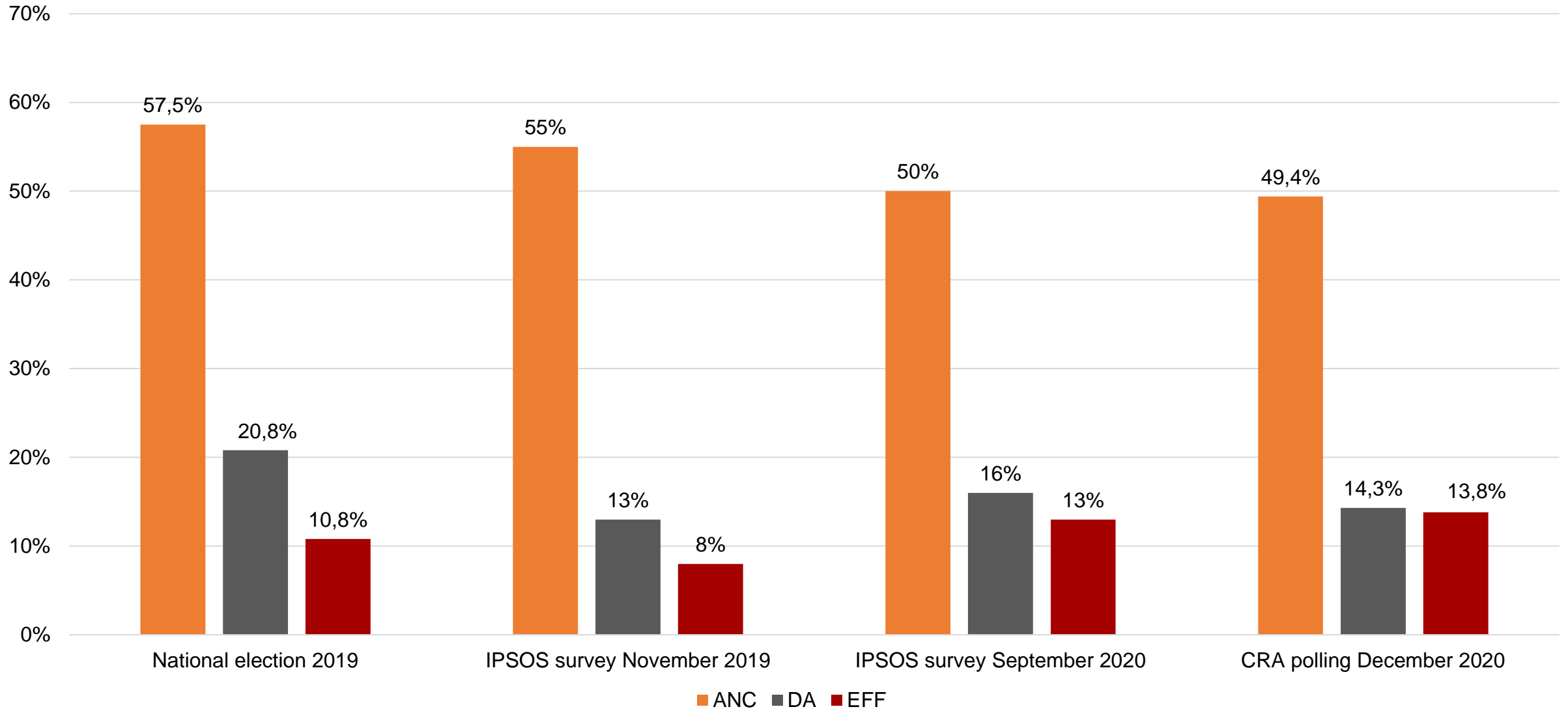
ANC support by educational qualification, 2020



ANC support by income level, 2020



Official election results and selected polling results, 2019 and 2020



Source: Ipsos

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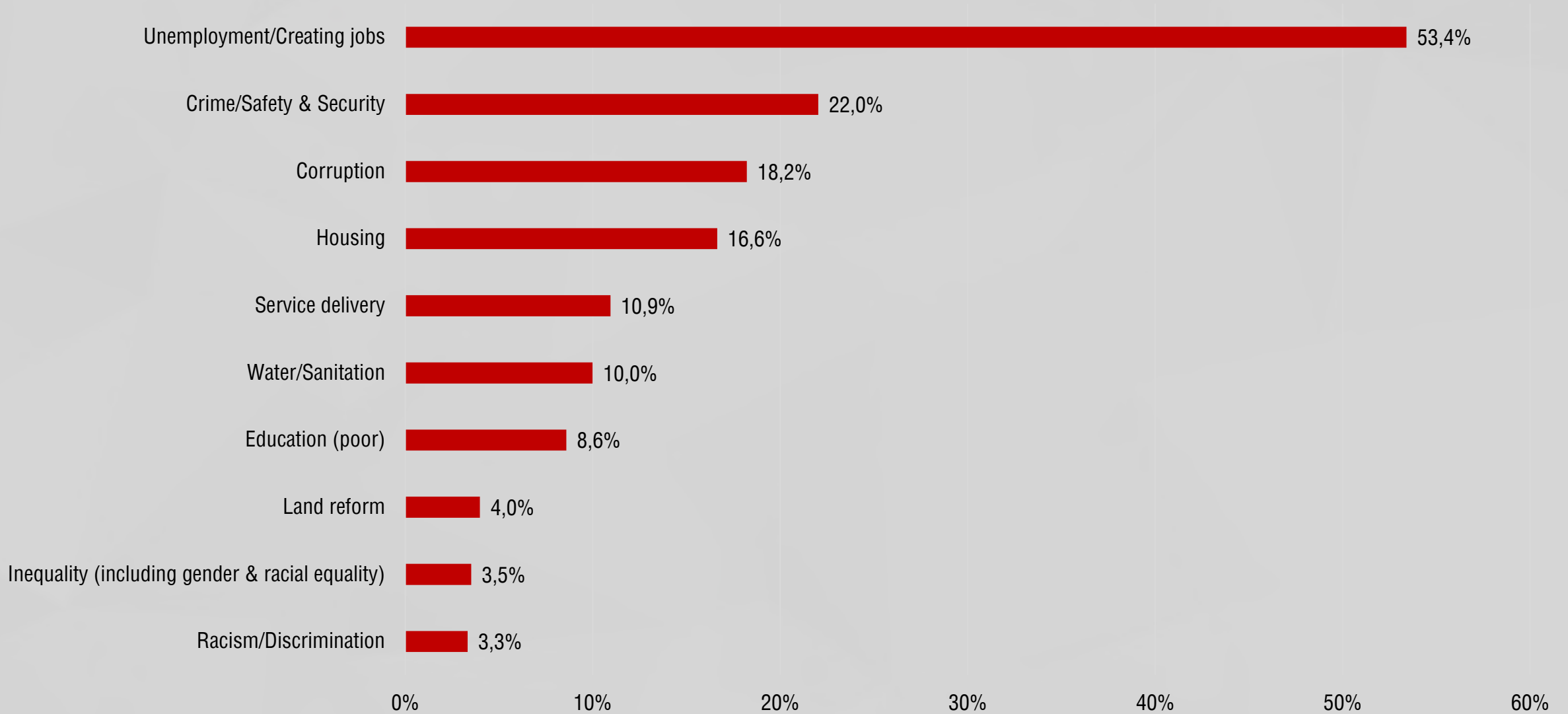
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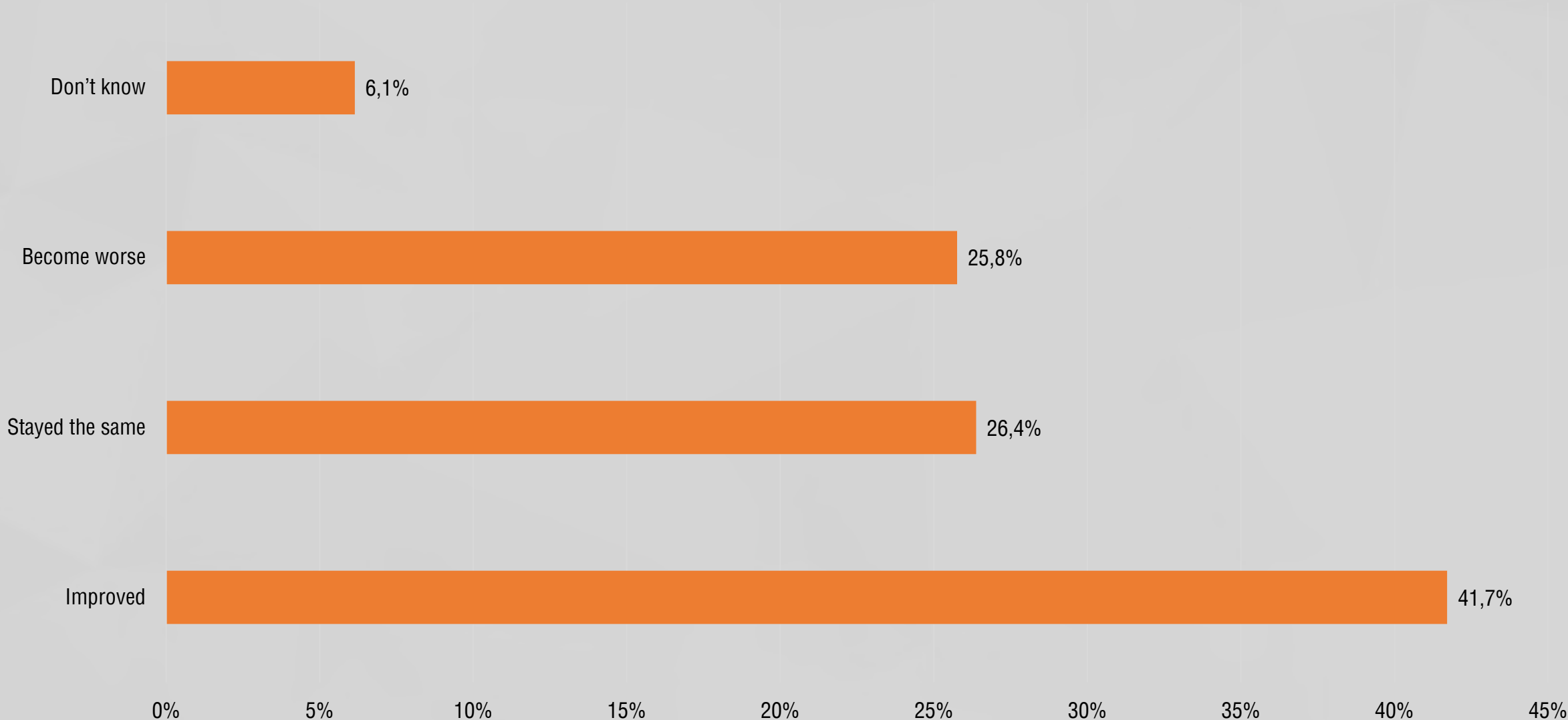
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Most serious problem in the country, 2020



Since 1994, relations between people of different races in South Africa have, 2020



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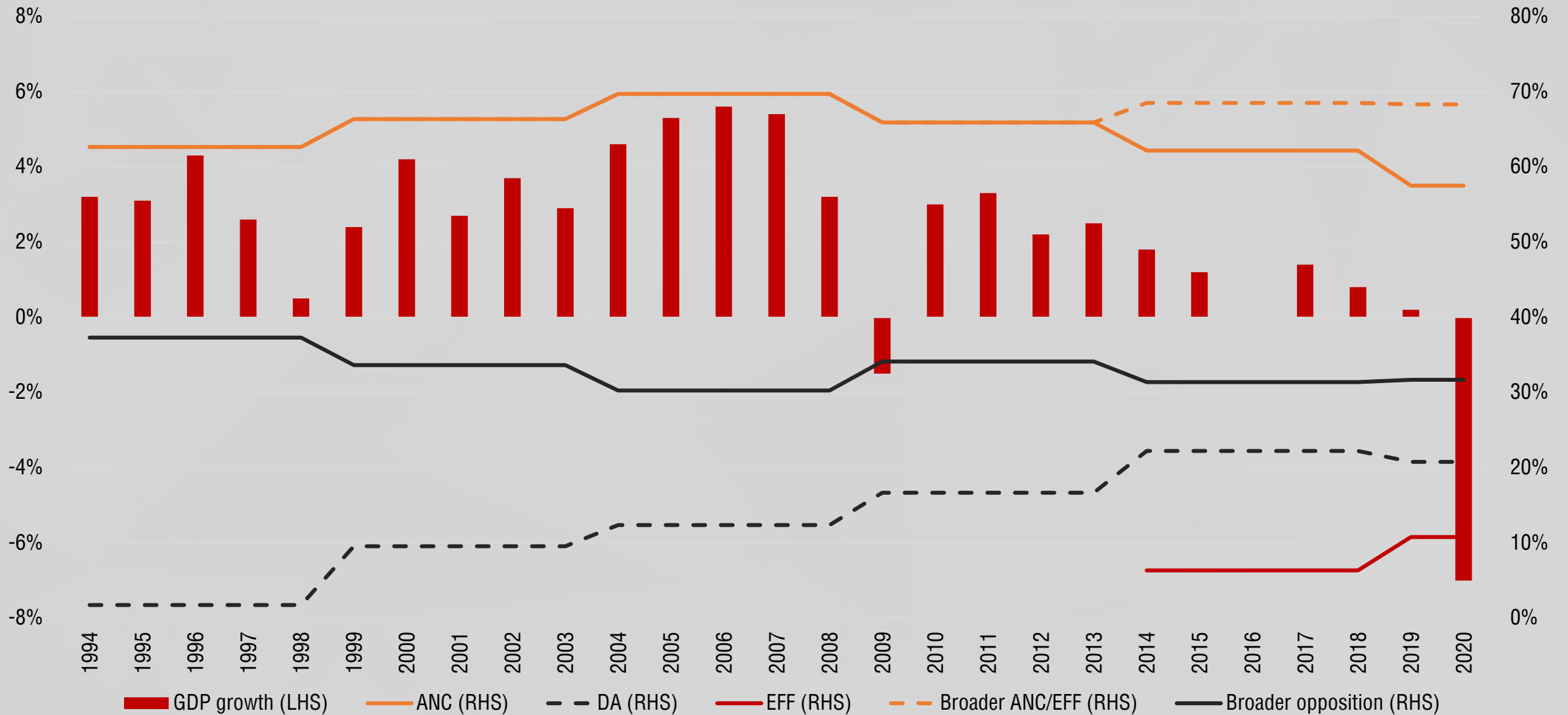
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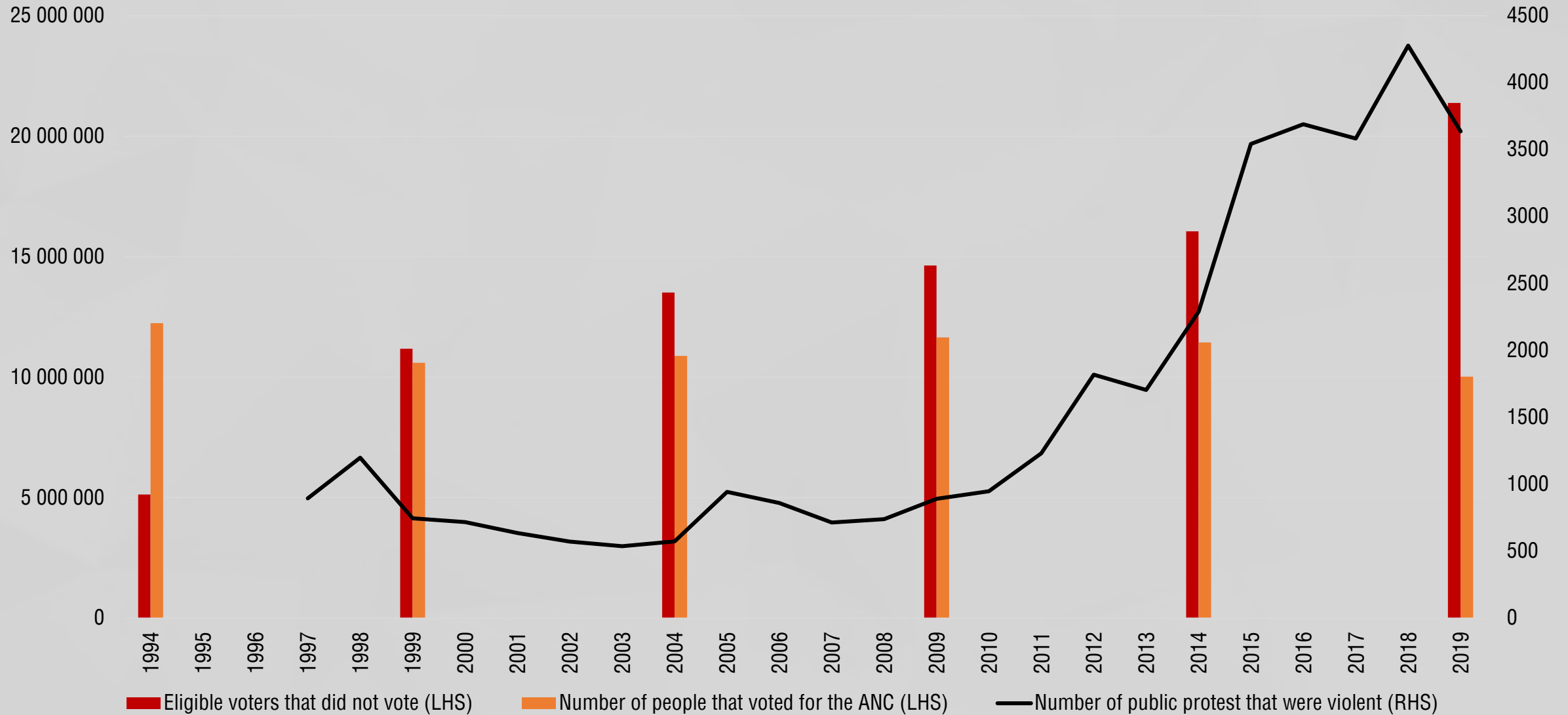
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The broad drift of 'the opposition' vs 'the broad ANC church', 1994-2020



Source: IEC

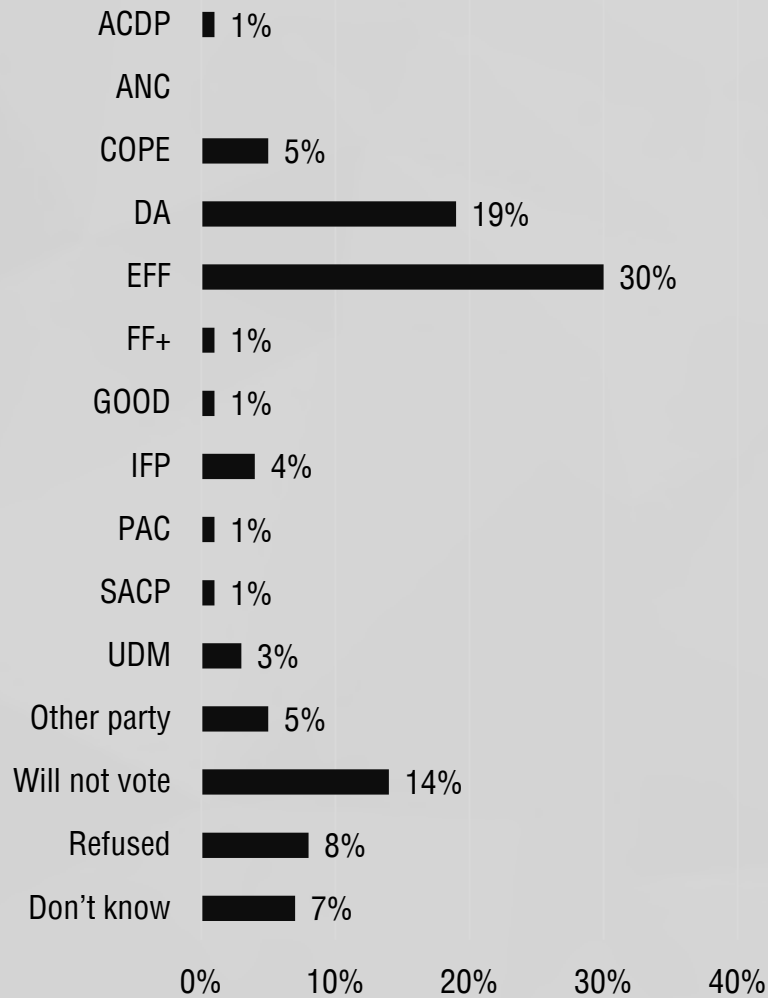
The rise of the non-voter, 1994-2019



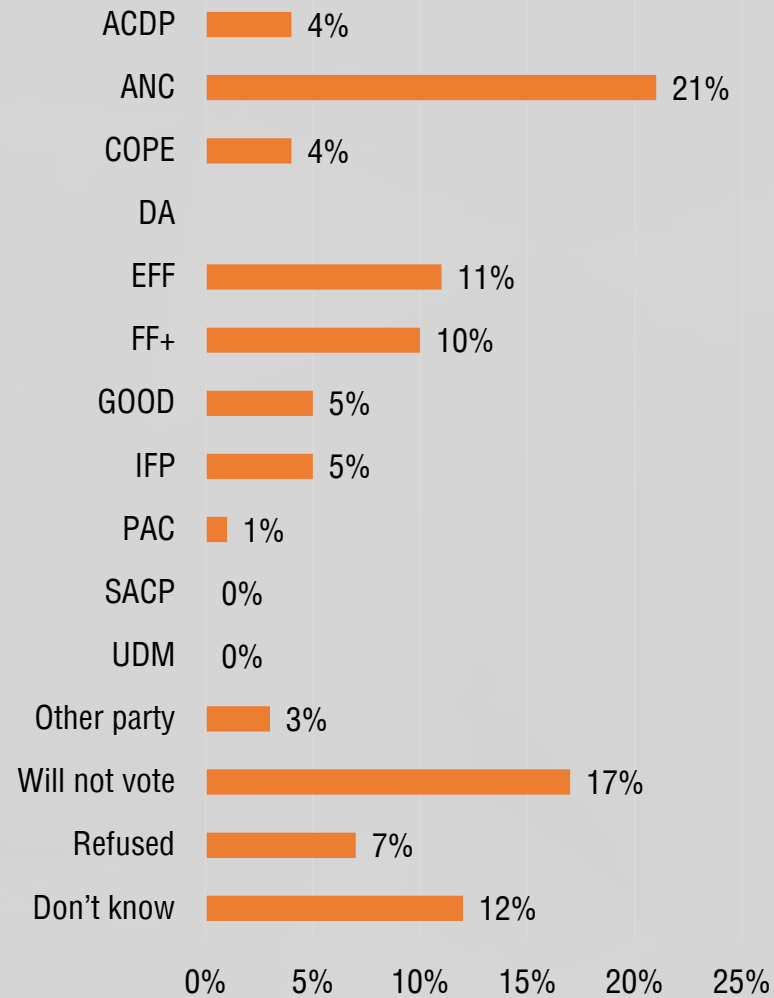
Source: Stats SA, IEC, Incident Registration Information System

Second choice parties, 2020

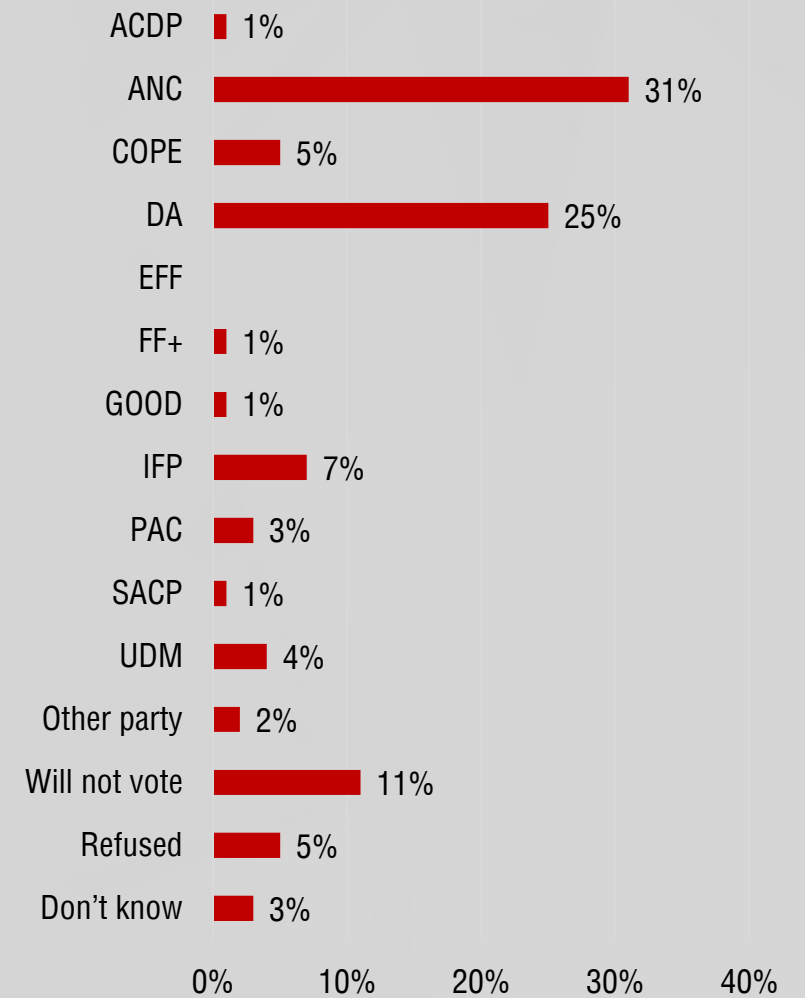
ANC



DA



EFF



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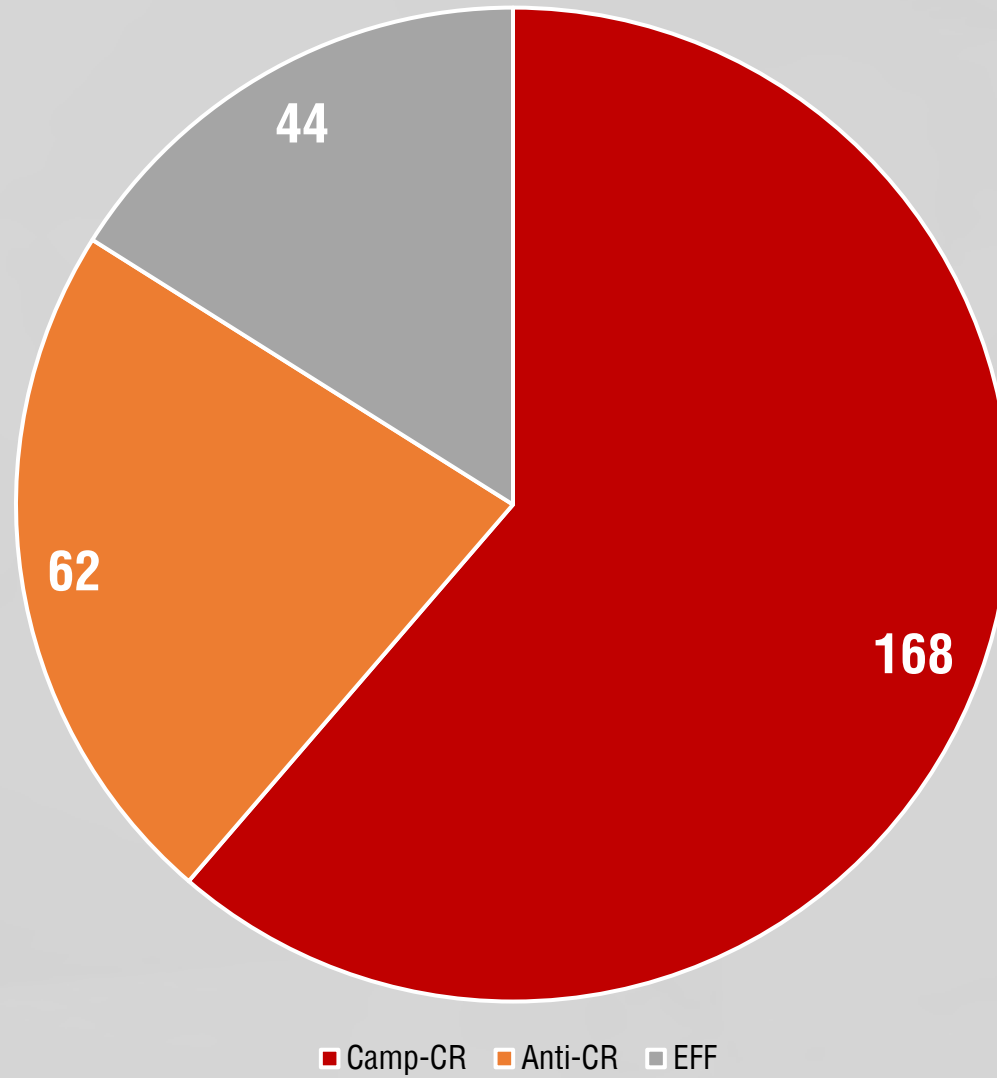
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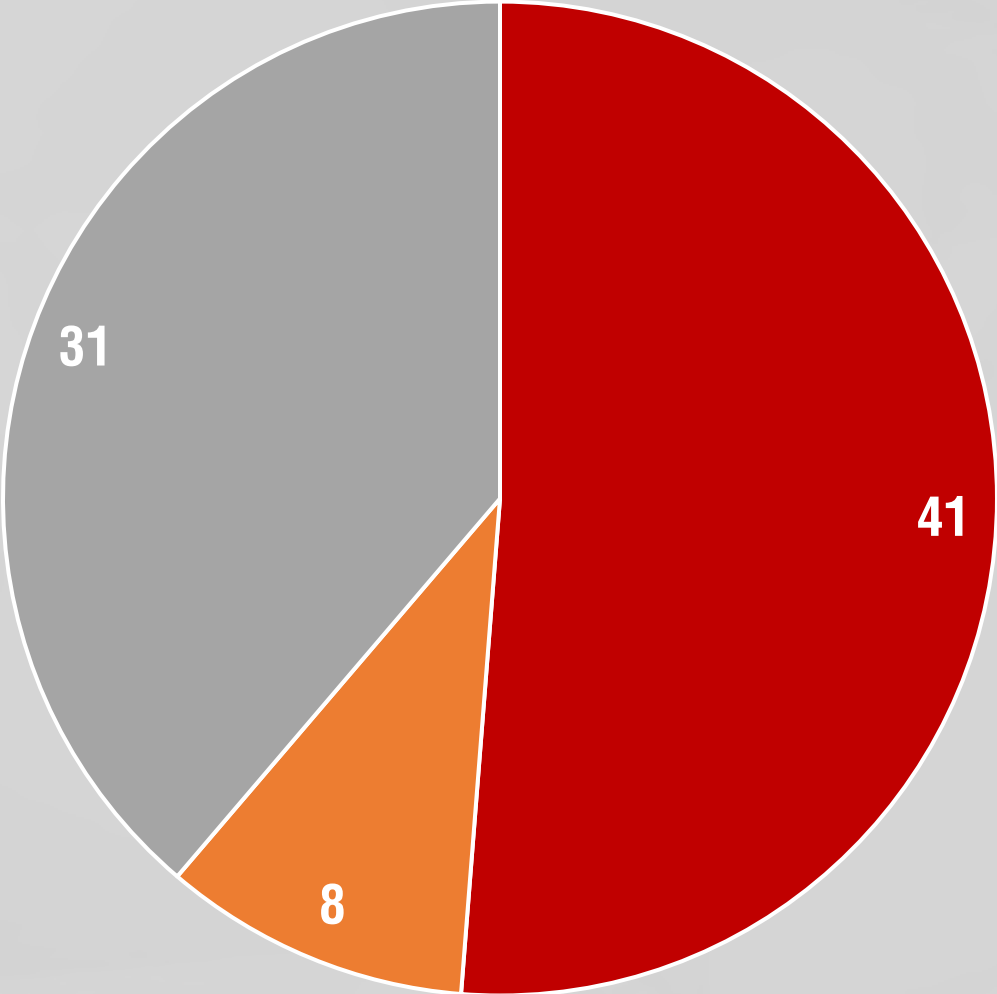
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Balance of power in the broader ANC 'caucus' in parliament



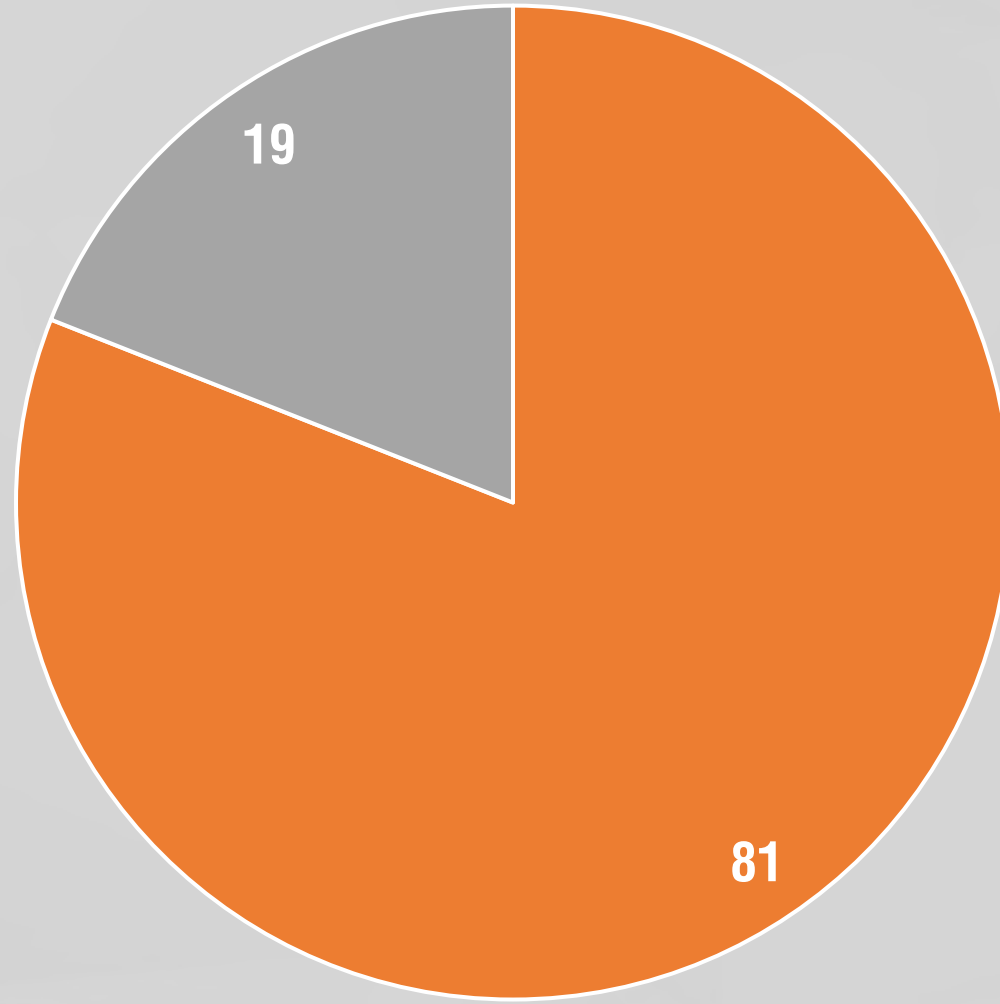
■ Camp-CR ■ Anti-CR ■ EFF

ANC NEC members and corruption



■ Implicated in serious corruption ■ Not implicated ■ Unknown

Balance of opinion in the Cabinet* (as a proportion of total)



■ Pro fundamental reform ■ Anti-reform ■ Possibly open to reform

*Reform defined as being: privately in favor of sweeping labour market reforms (wages, bargaining councils, private voluntary contract, in favor of socio-economic based empowerment policy, and privately opposed to EWC.)

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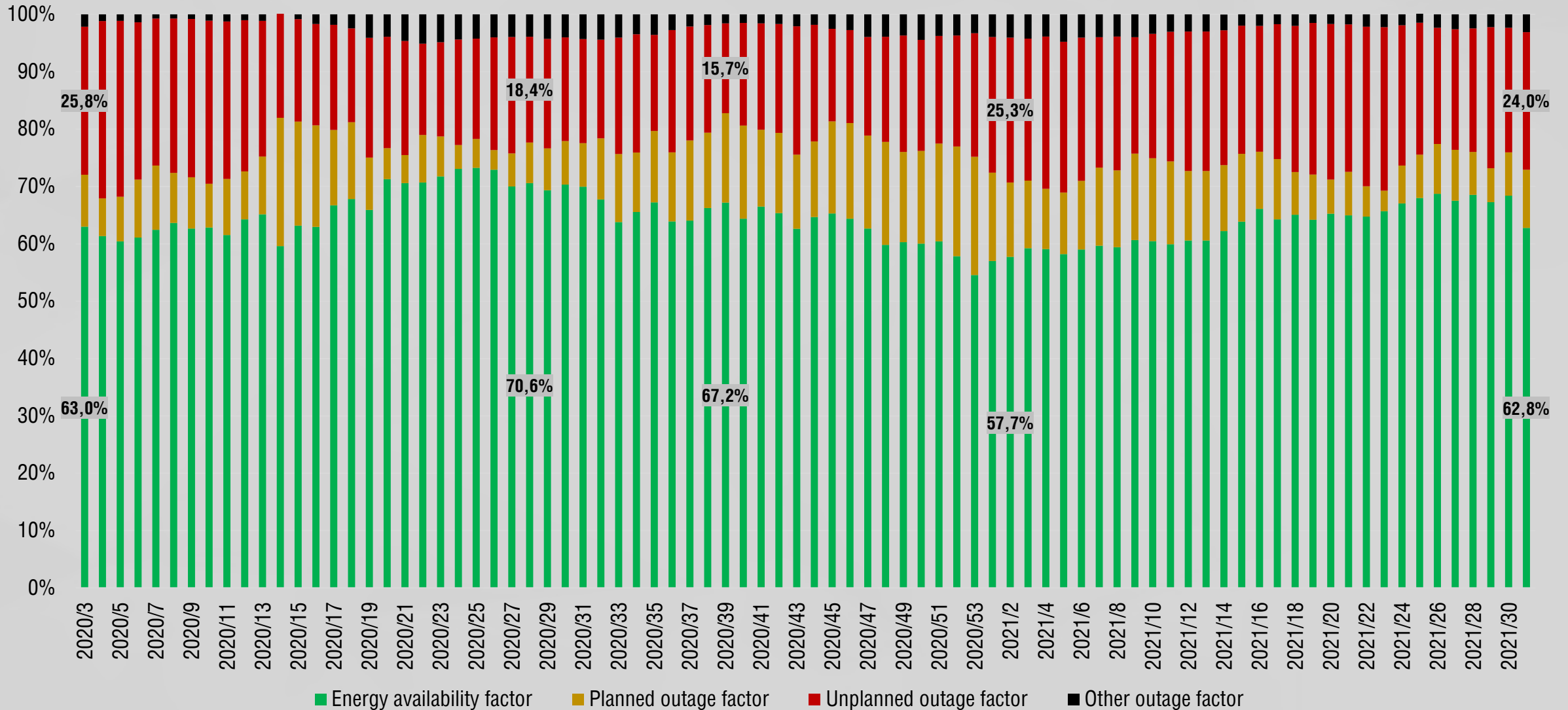
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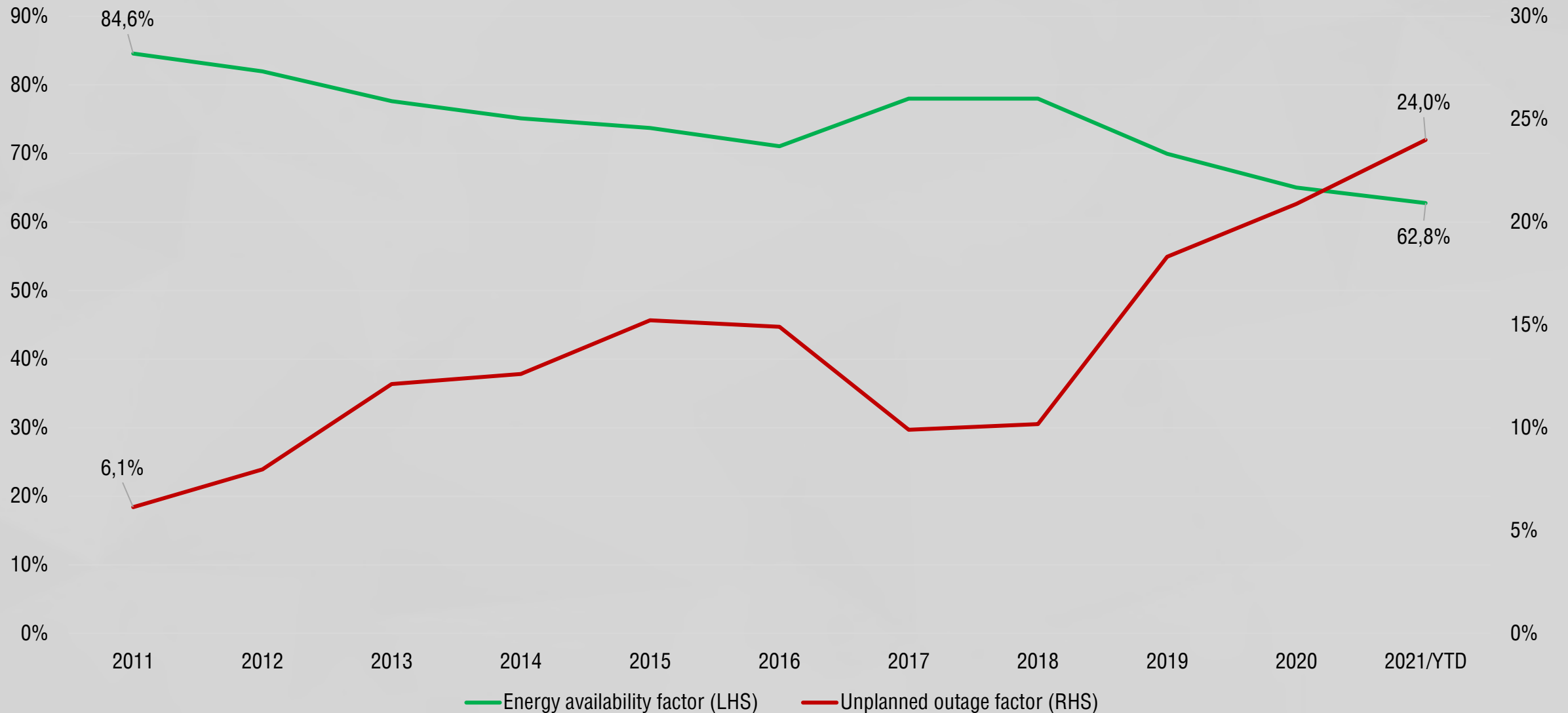
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Weekly generation availability, 2020/03-2021/YTD



Energy availability factor and Unplanned outage factor, 2011-2021/YTD



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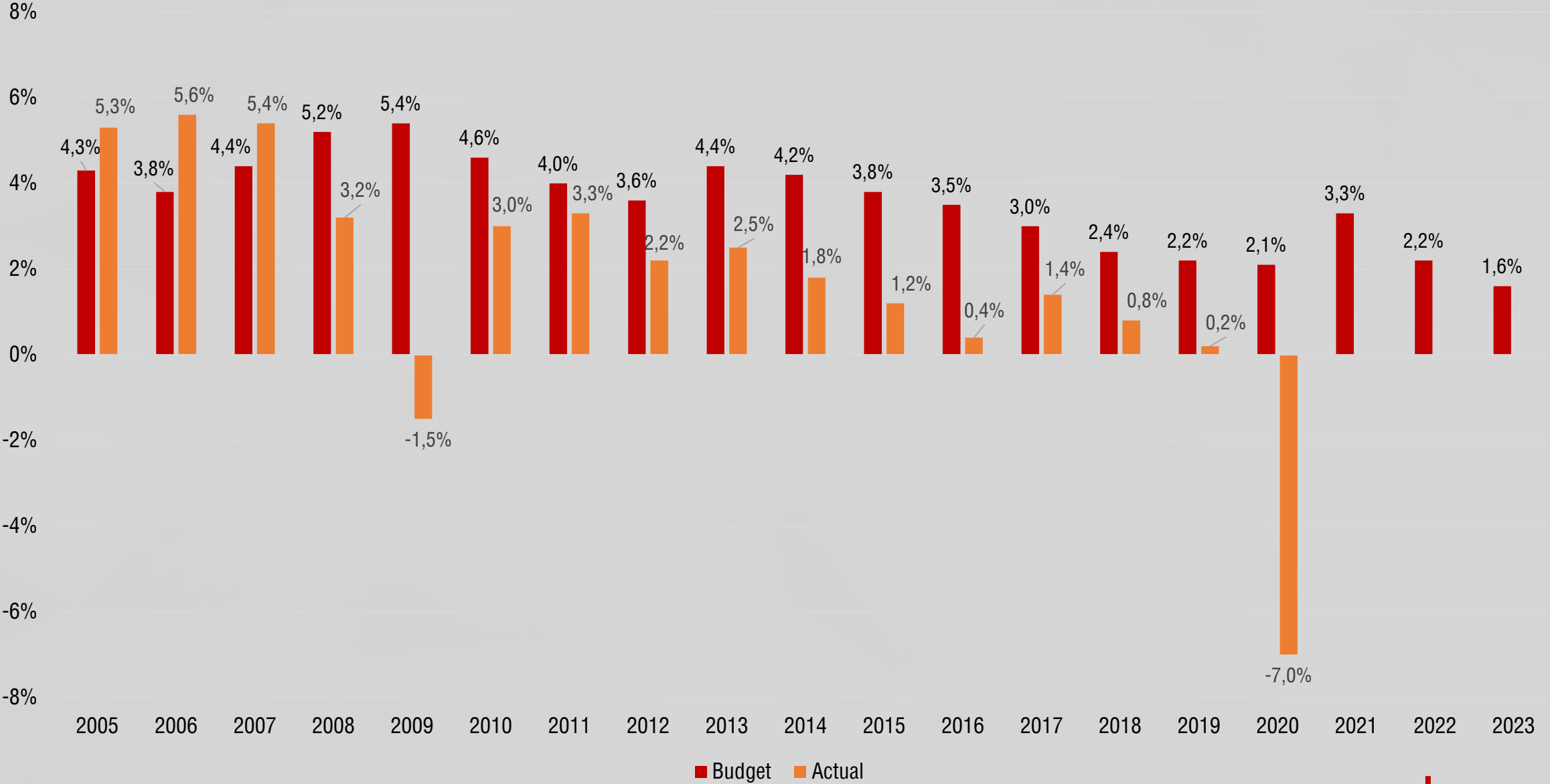
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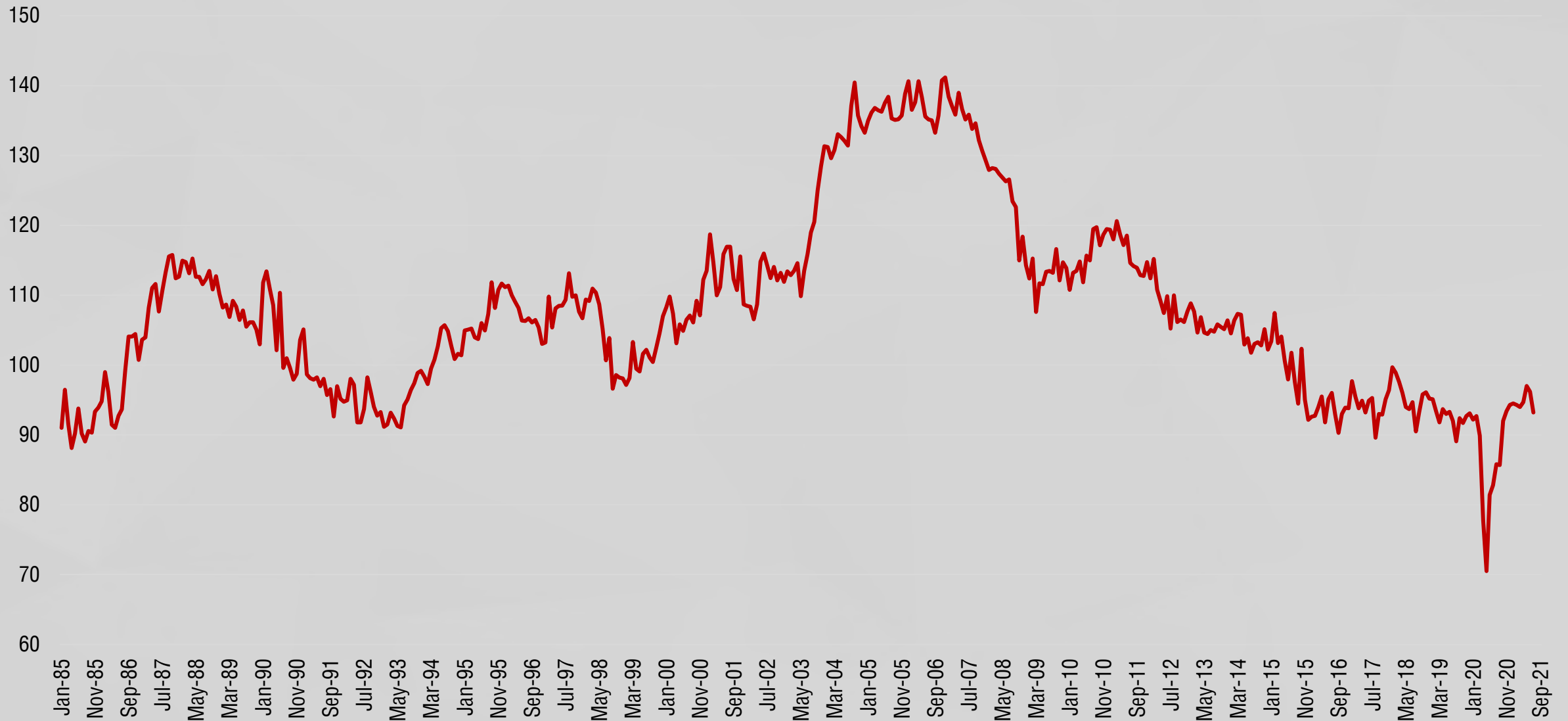
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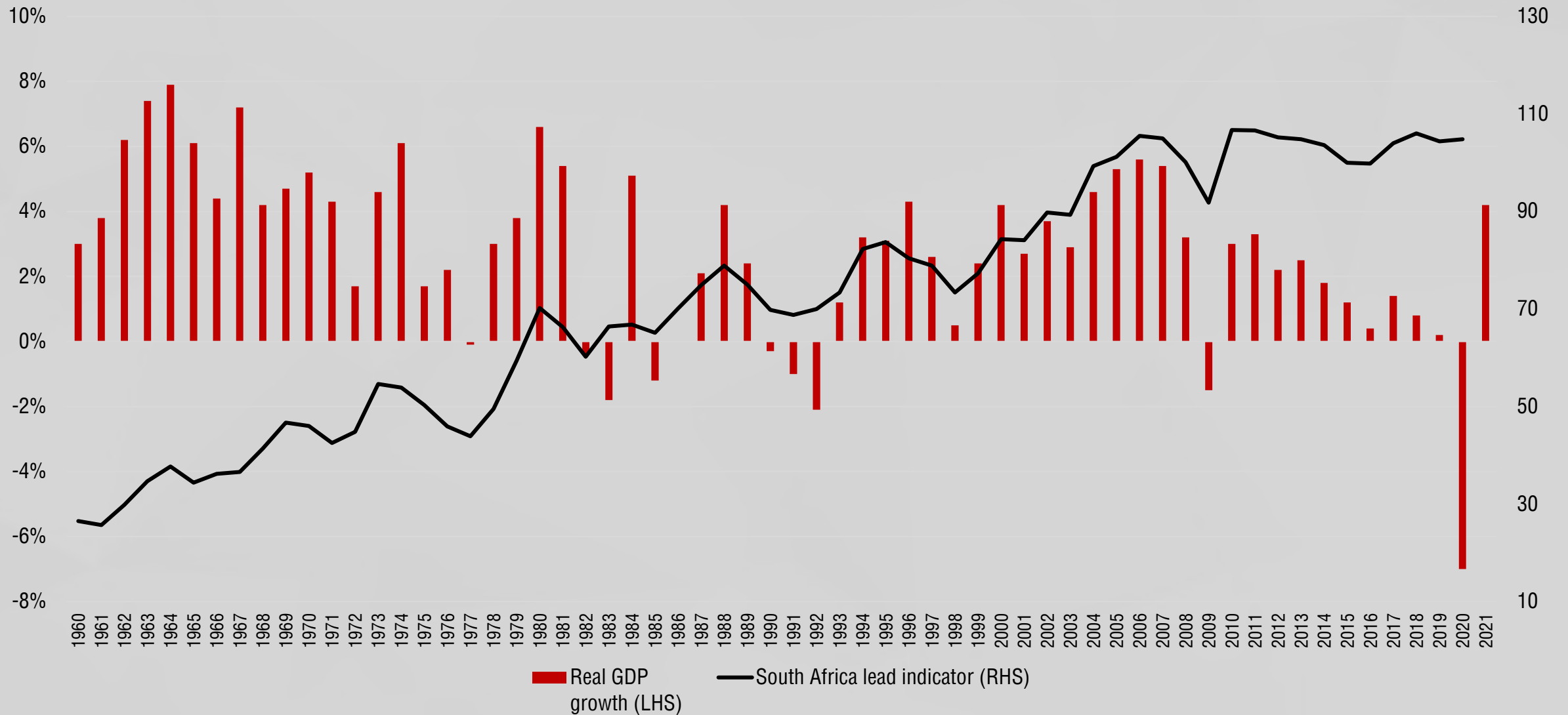
February budget GDP forecasts and reality, 2005-2023



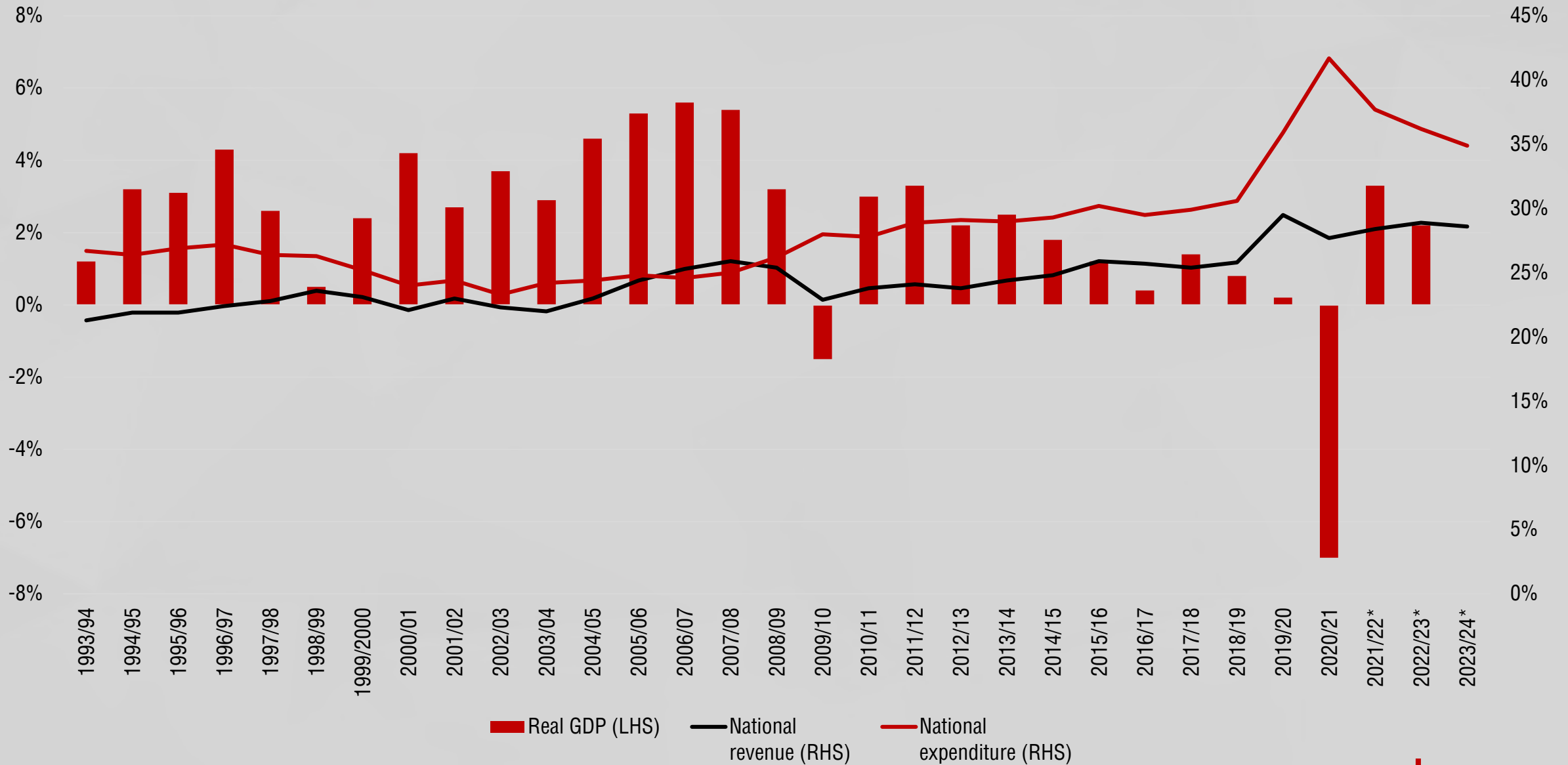
SACCI business confidence index, 1985-2021



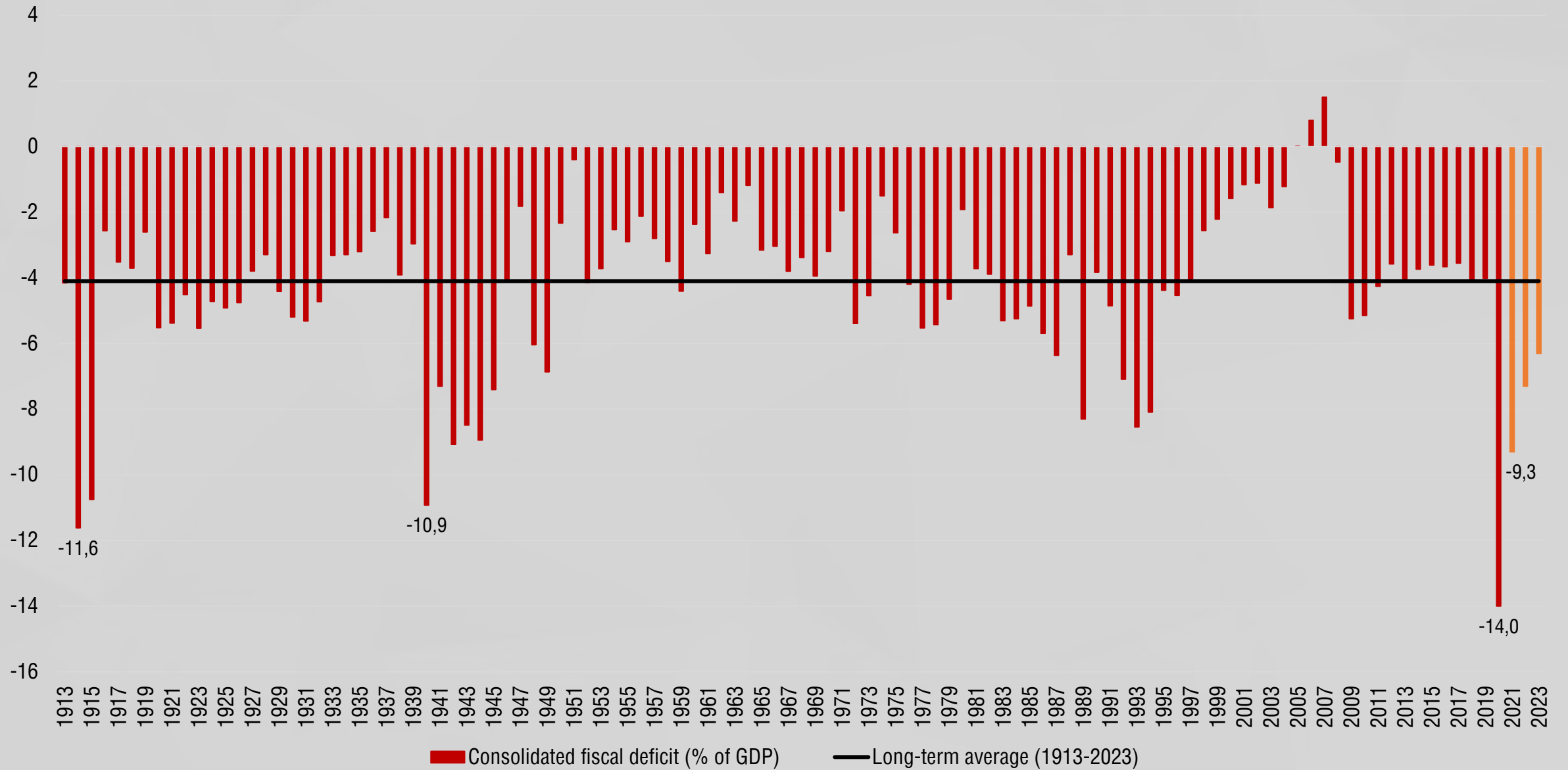
Real GDP growth and South Africa lead indicator, 1960-2021



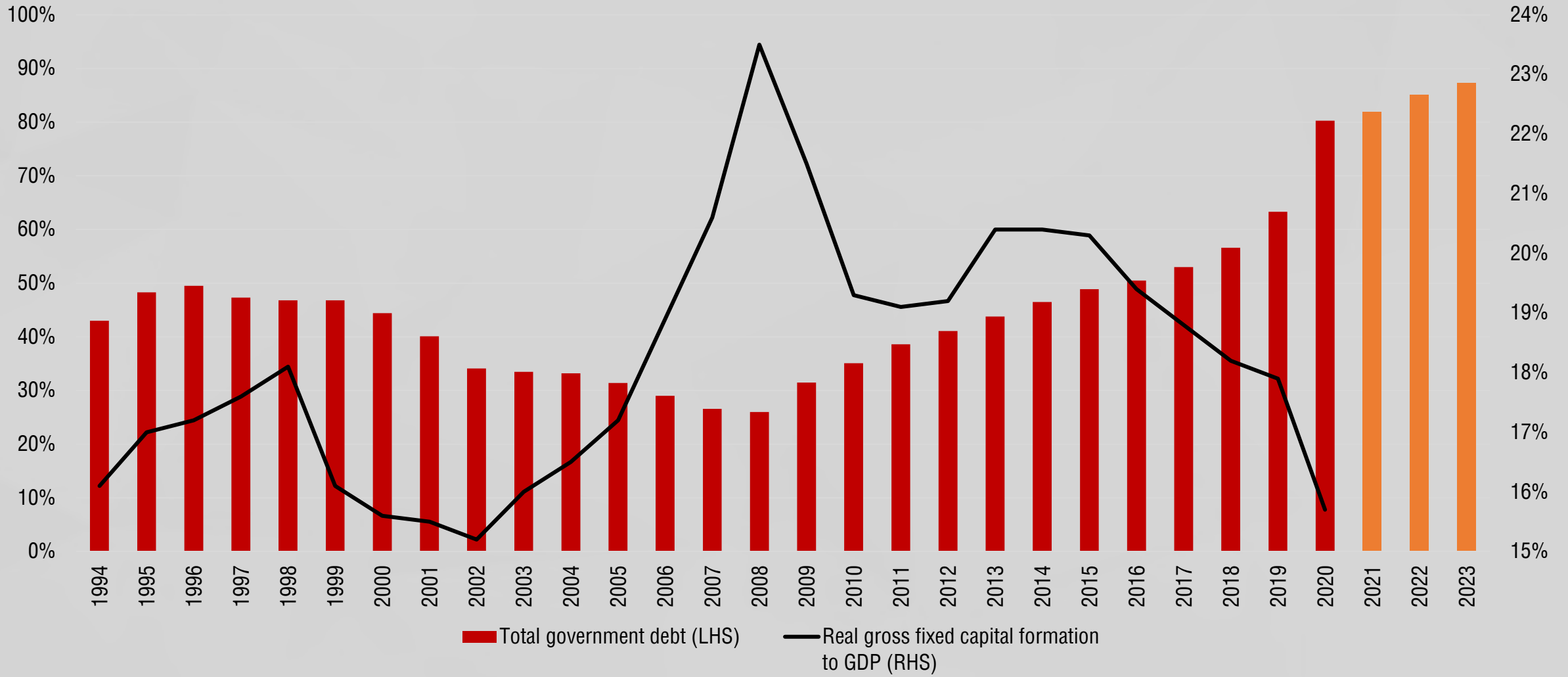
Main budget revenue, expenditure as a proportion of GDP and real GDP, 1993/94-2023/24



Budget deficit (Consolidated), 1913-2023



Government debt and real gross fixed capital formation (GFCF) as a proportion of GDP, 1994-2023



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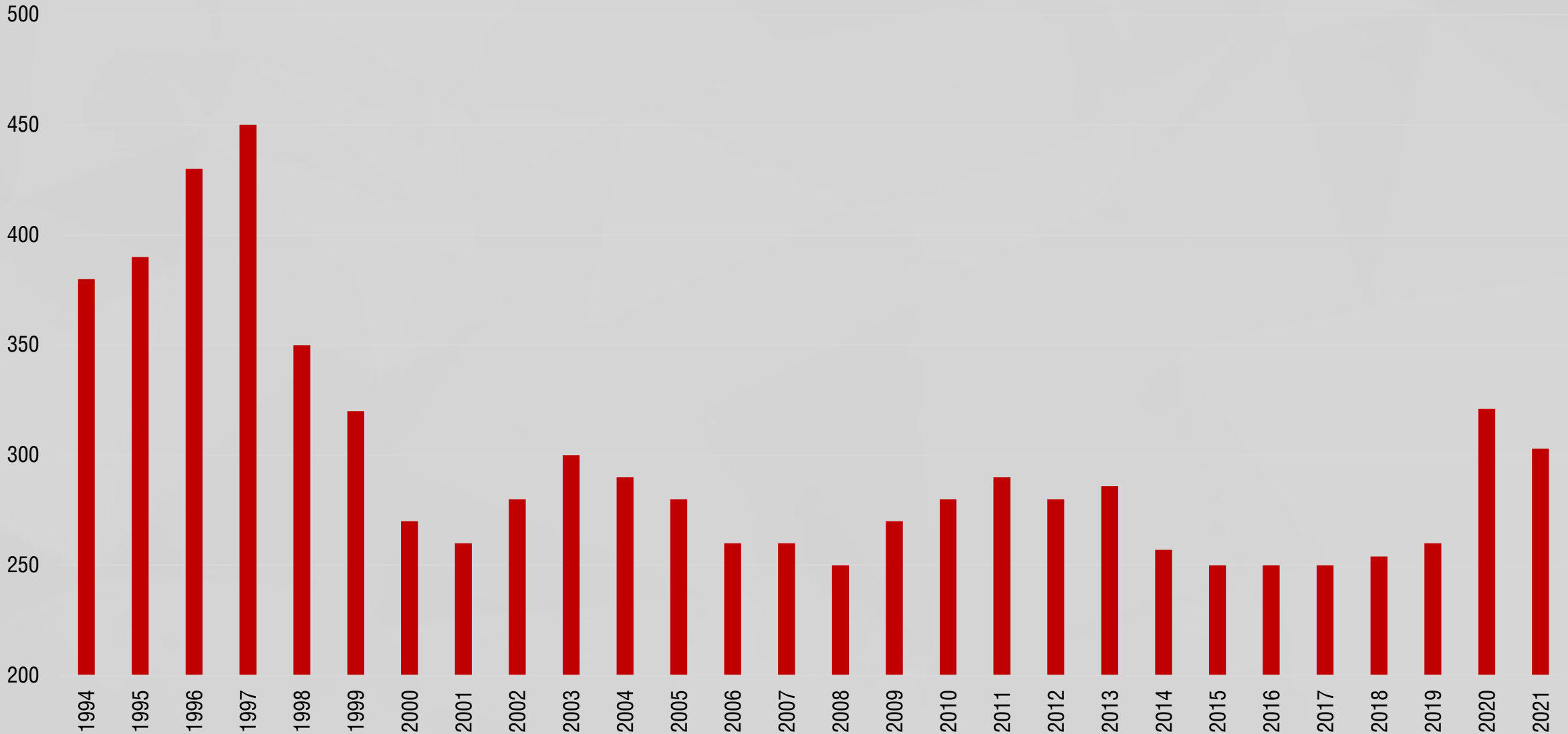
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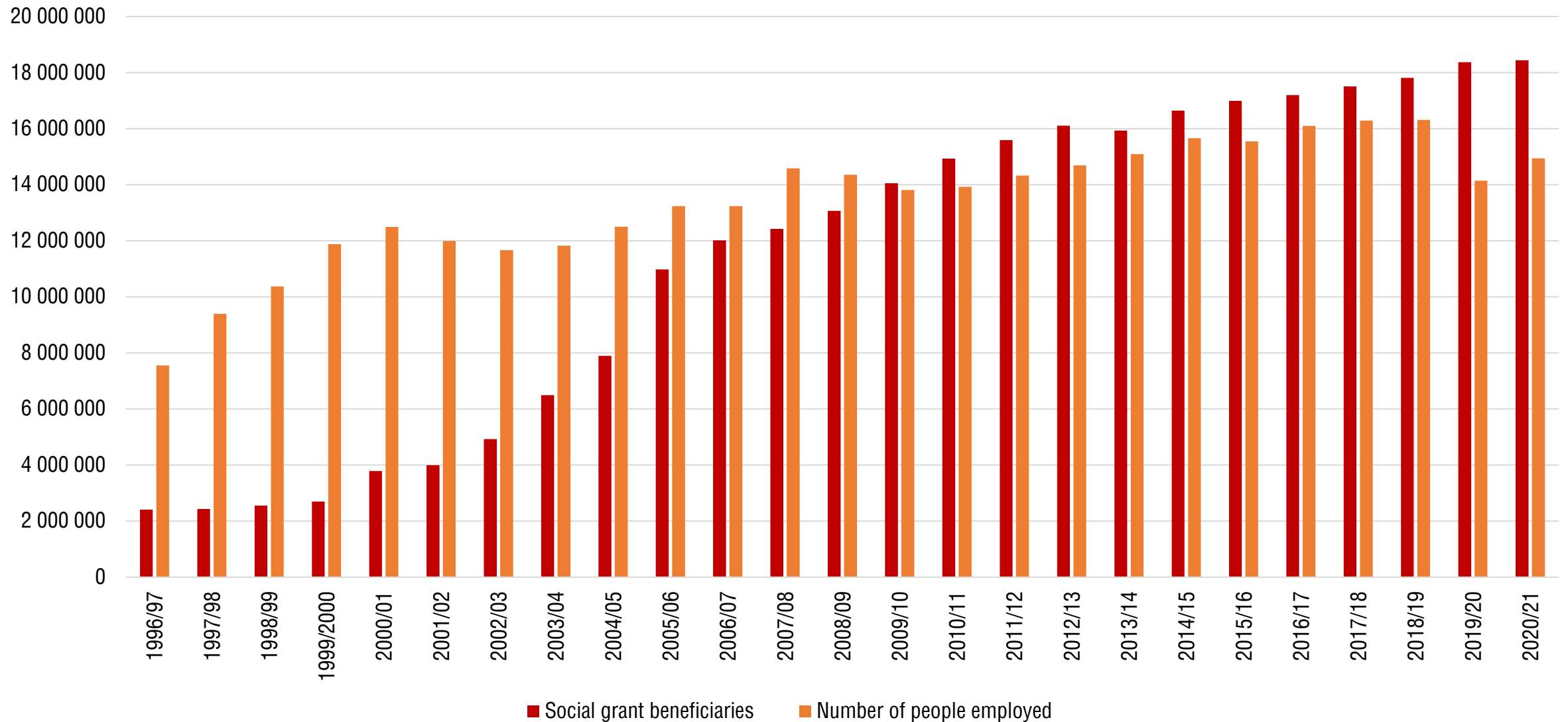
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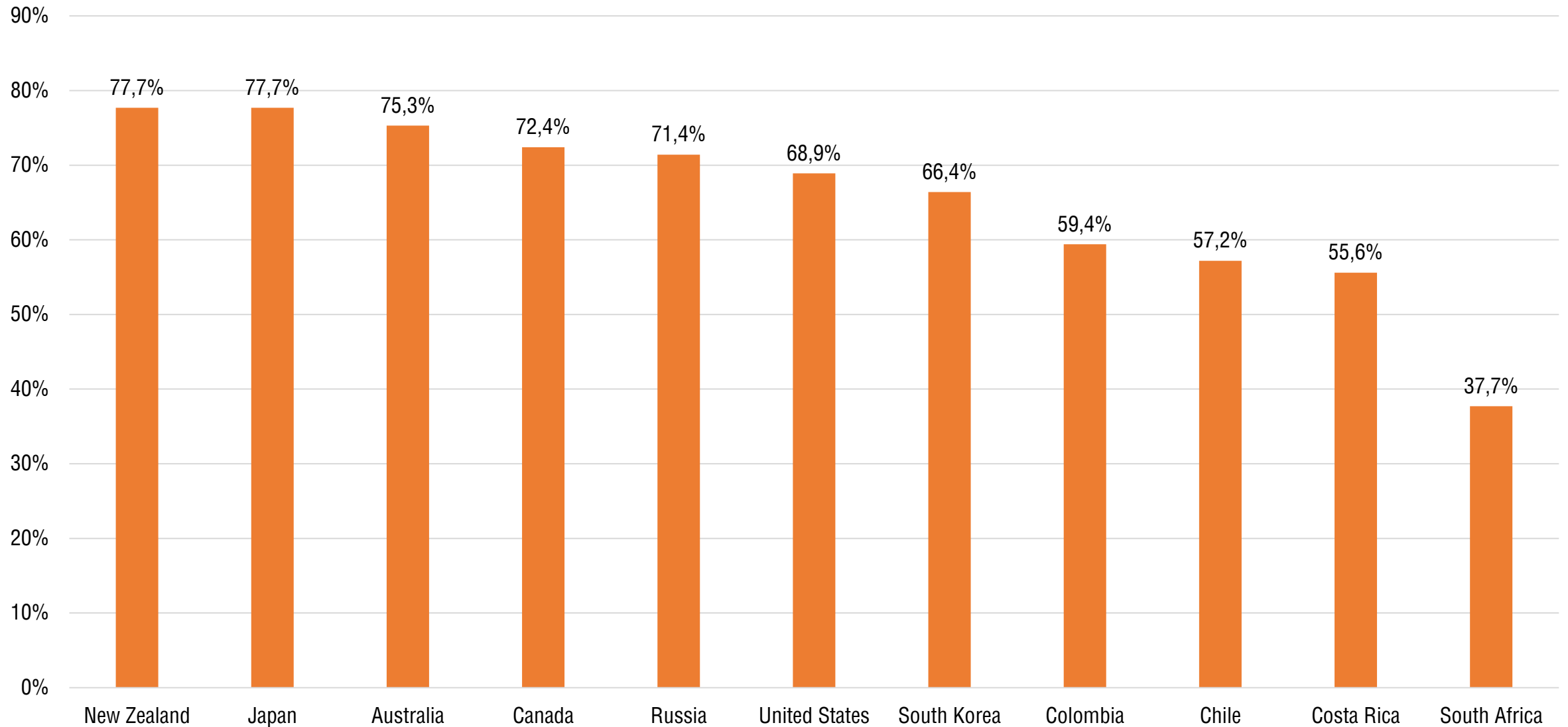
Dependency on the employed, 1994-2021



Social grant beneficiaries and number of people employed, 1996/97-2020/21



Labour absorption rates for selected countries, Q2 2021



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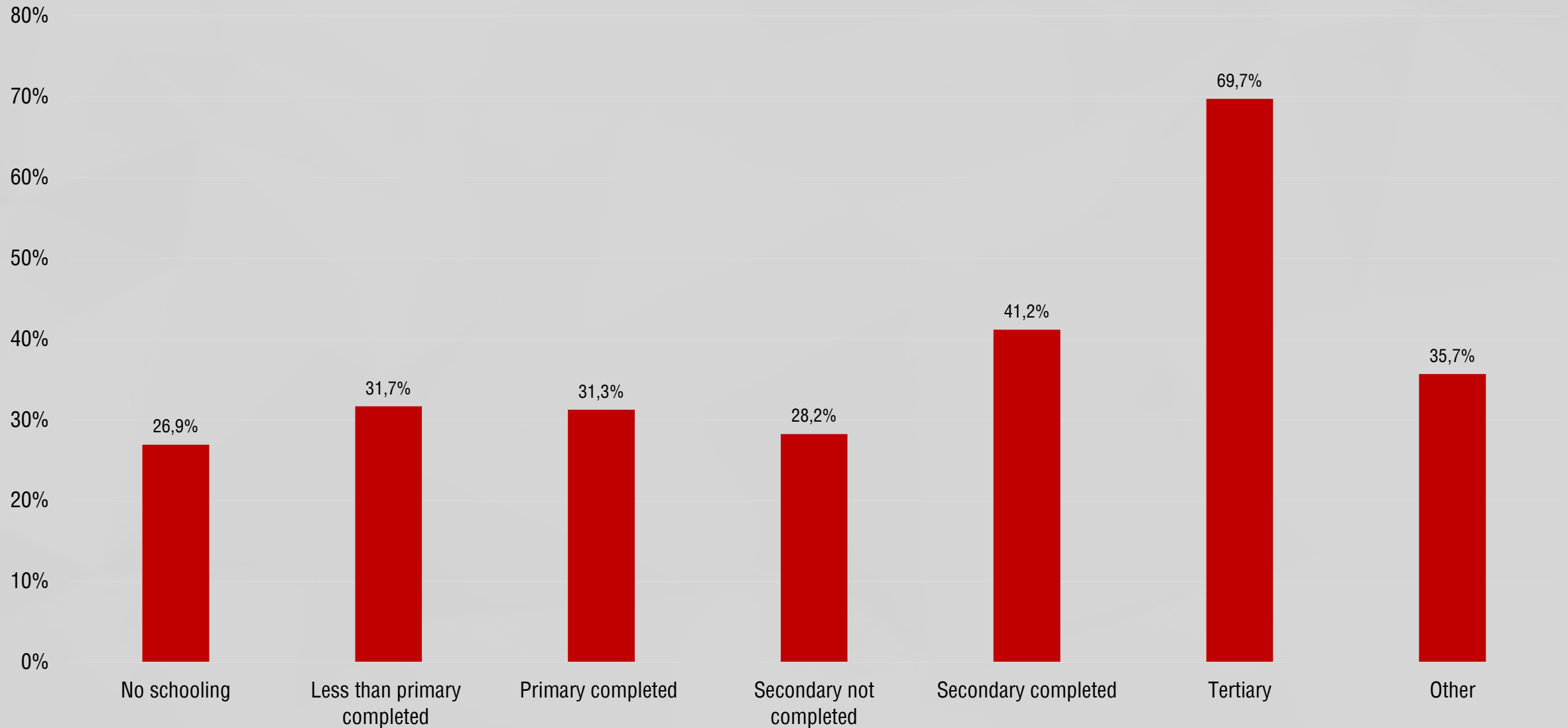
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Labour absorption rate by level of education, Q2 2021



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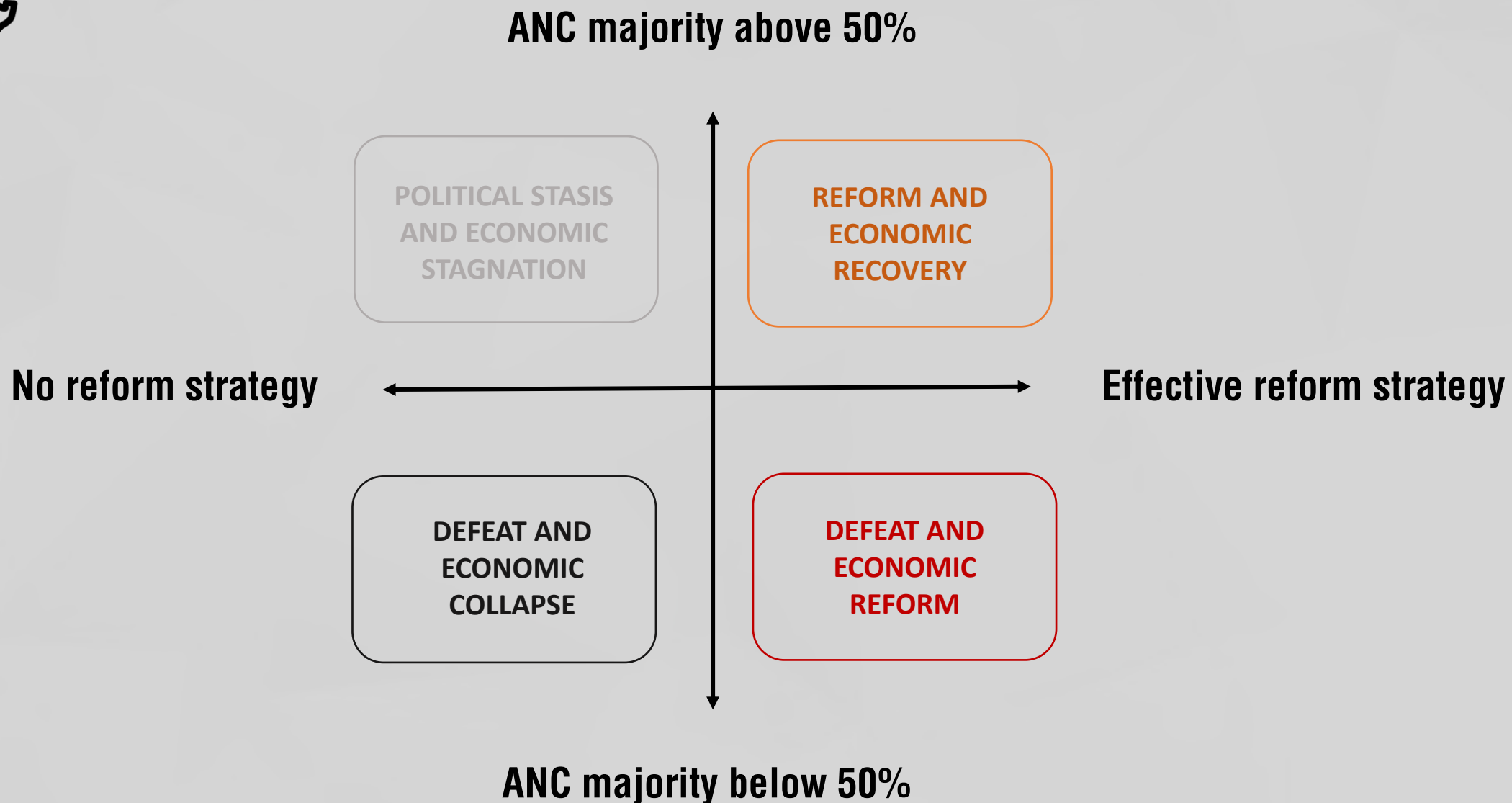
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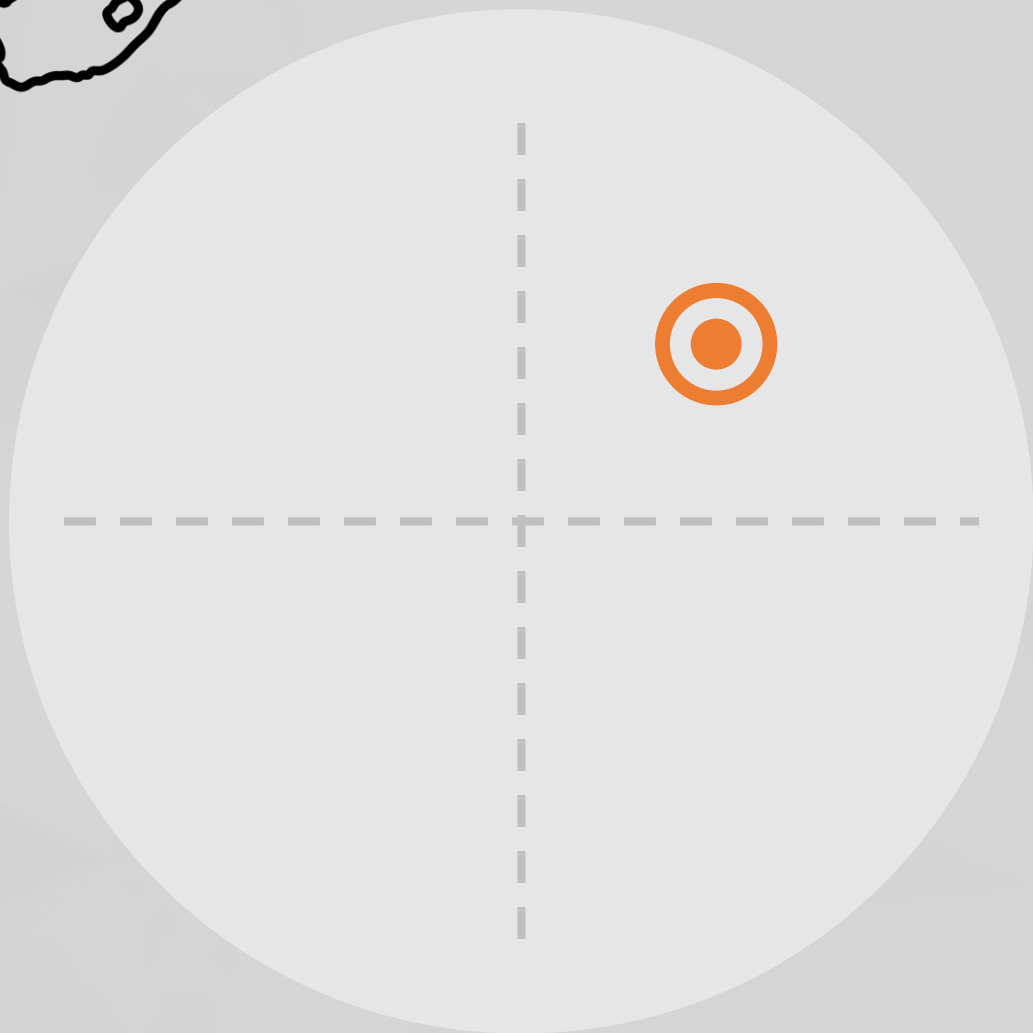
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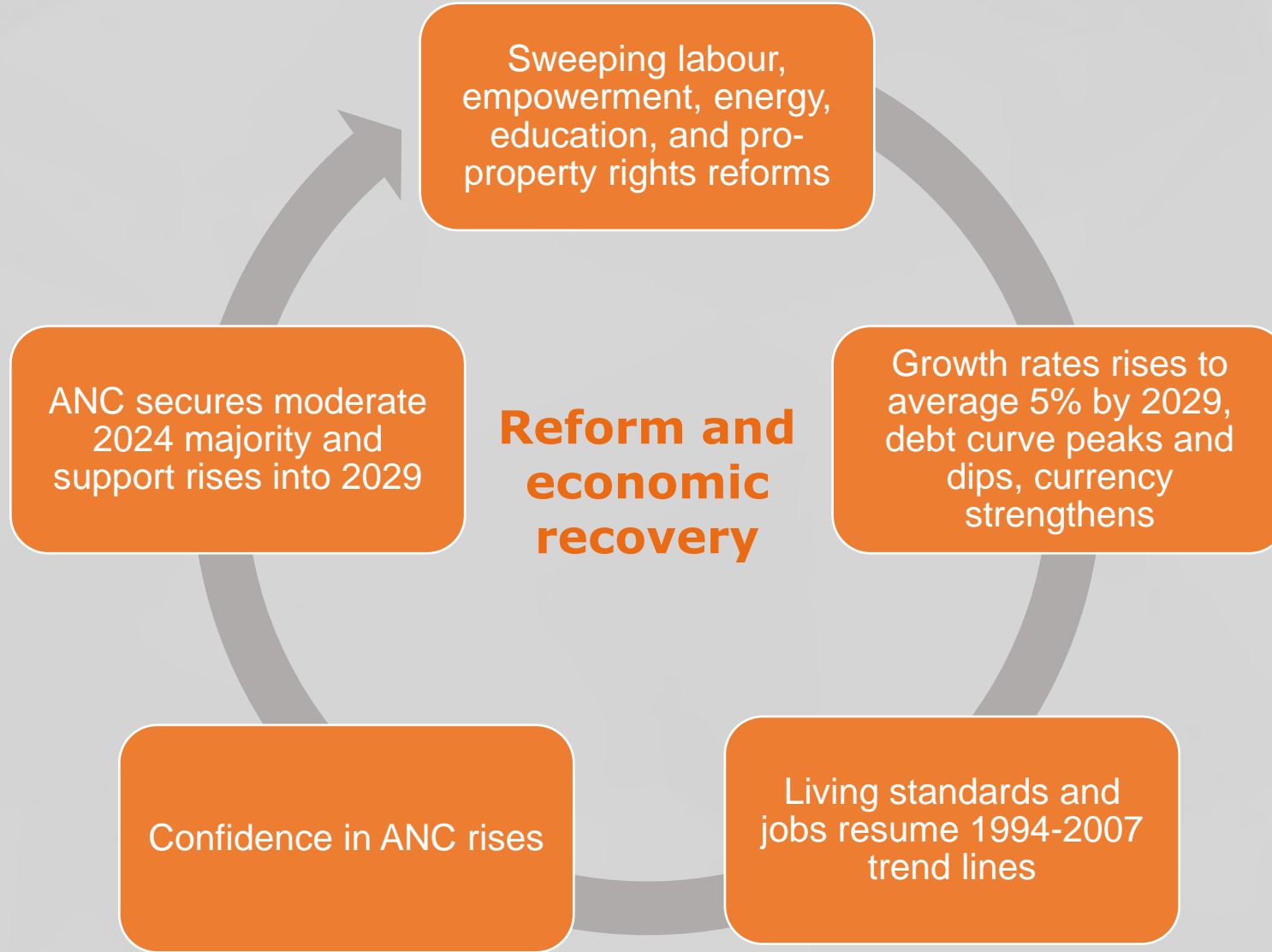
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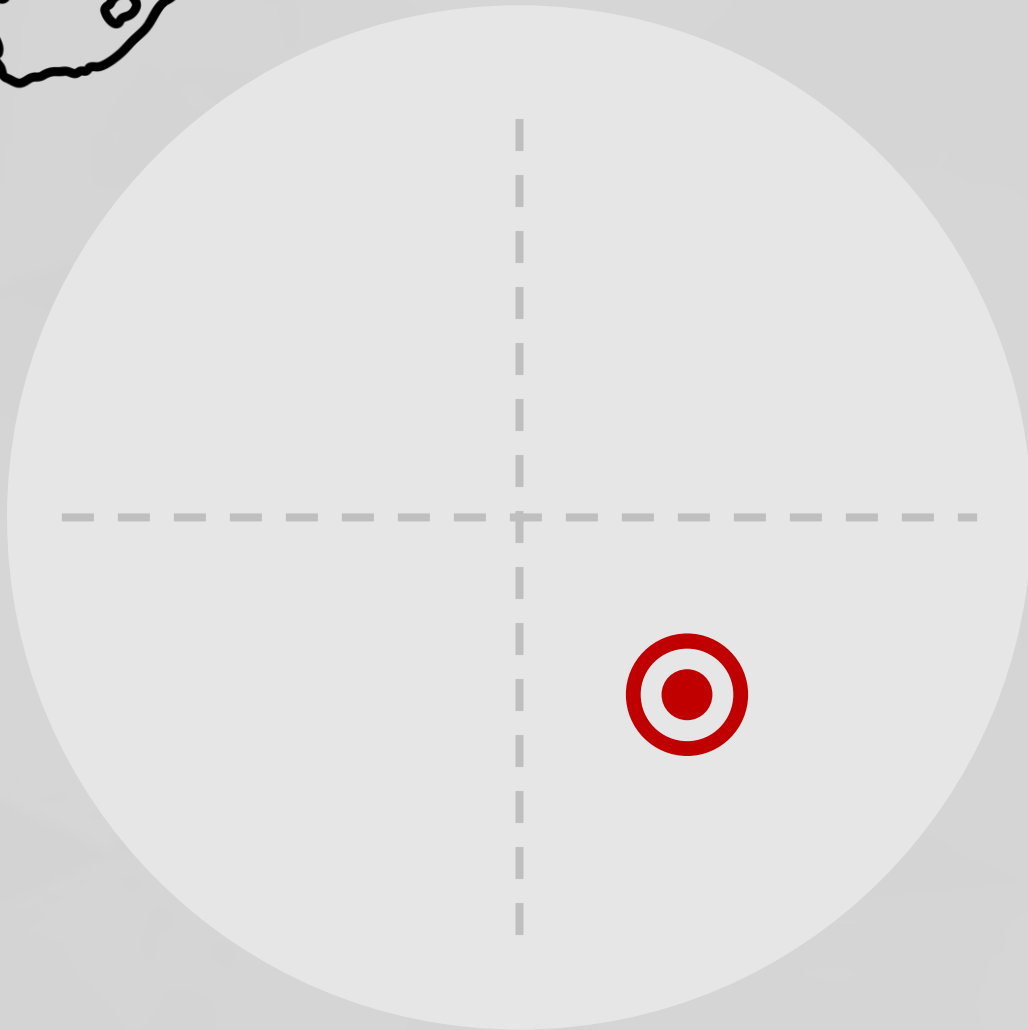
Reform and economic recovery

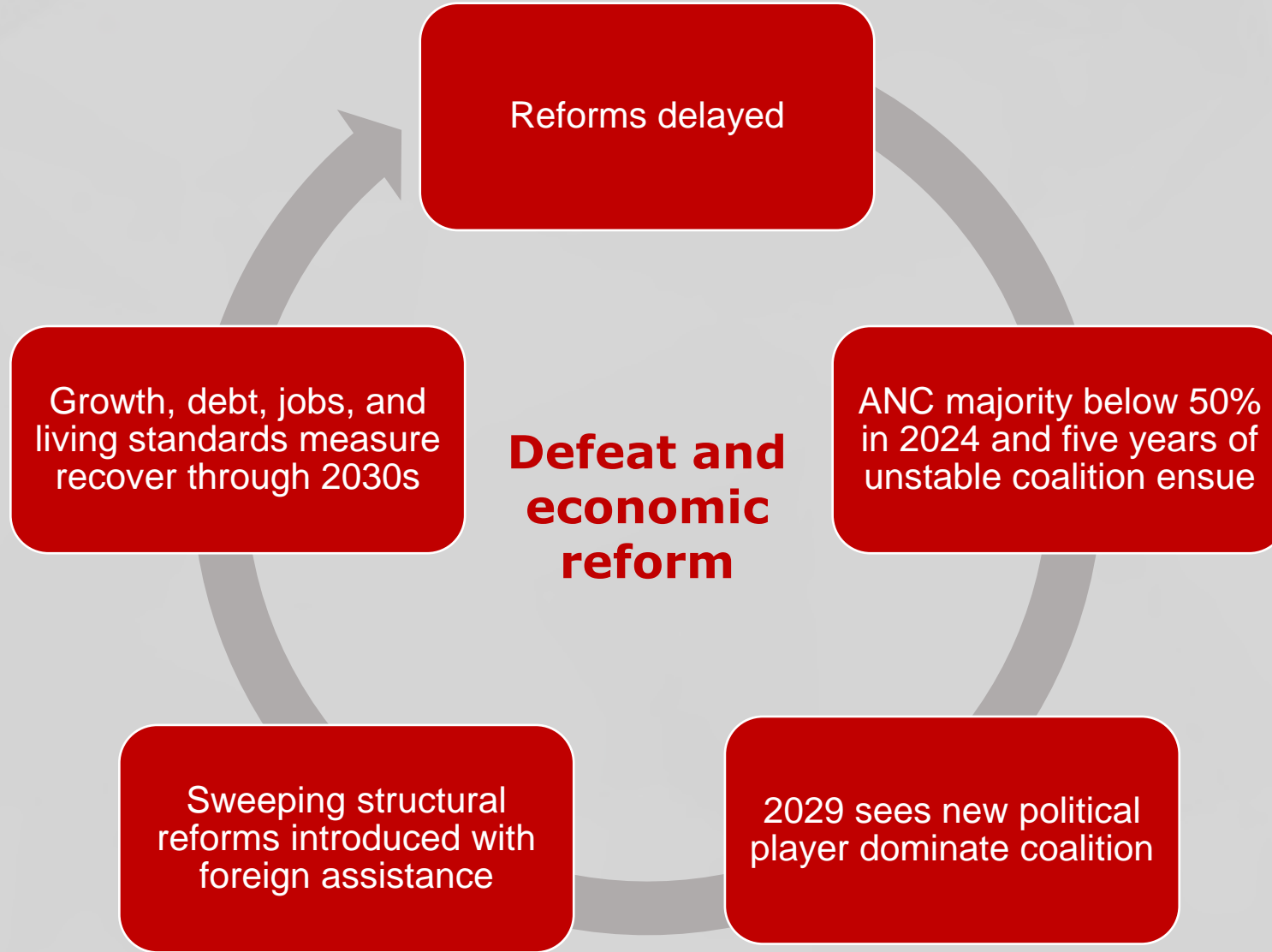






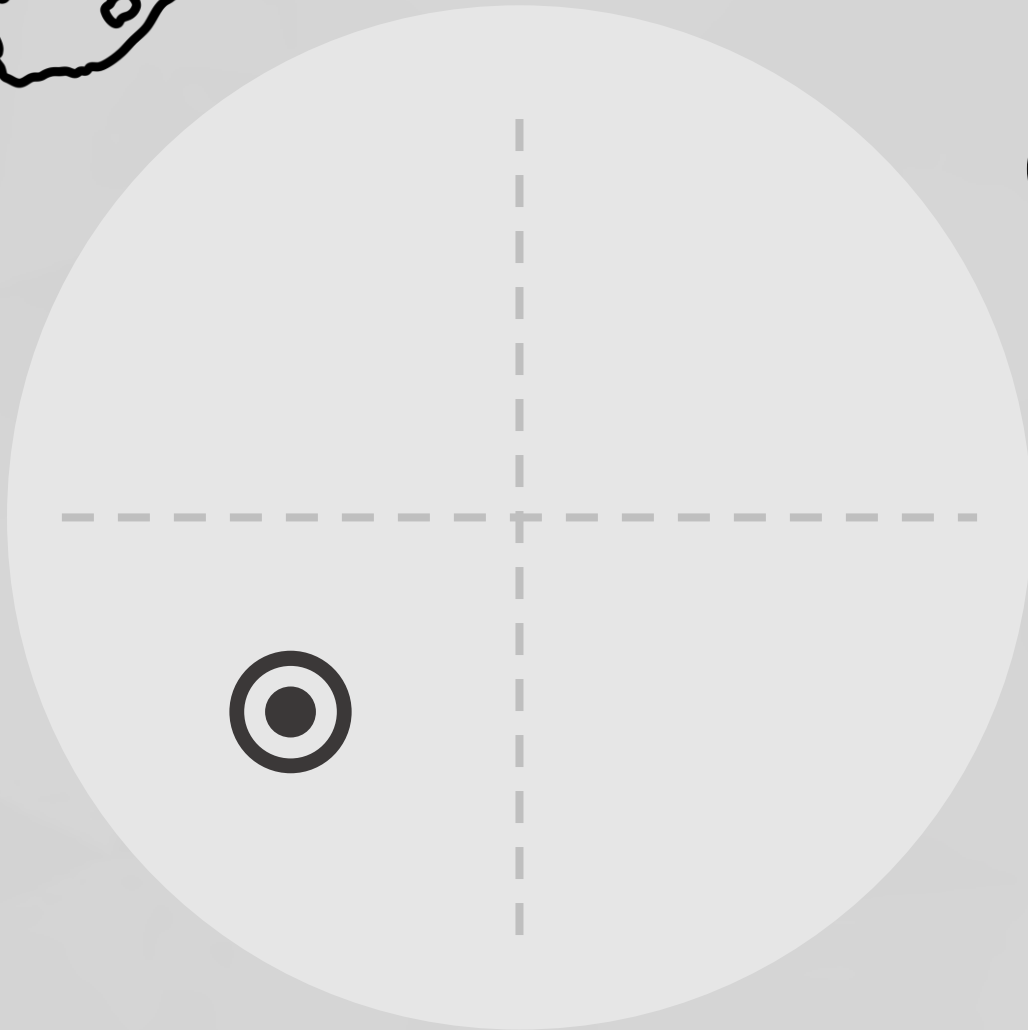
Defeat and economic reform

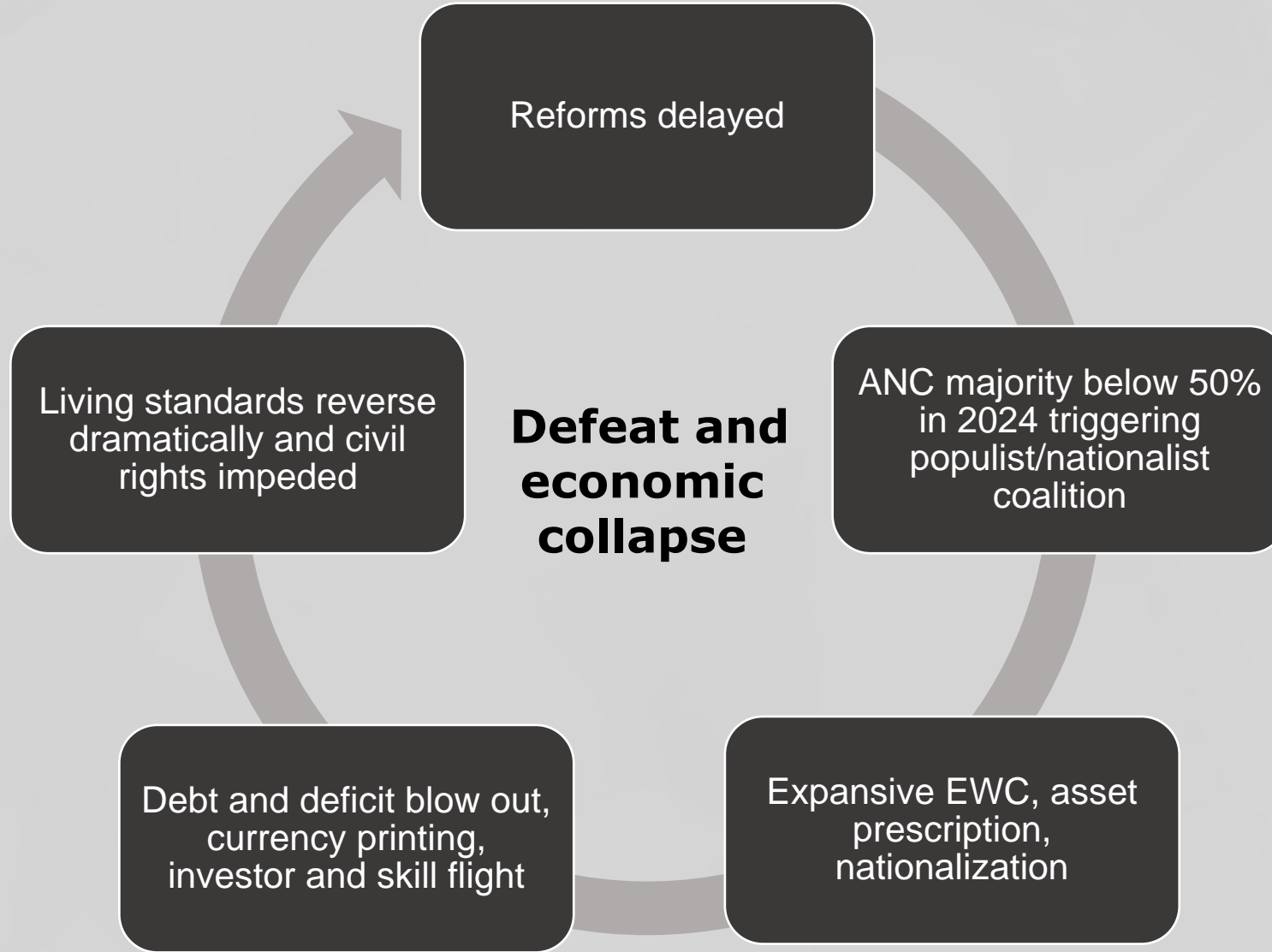






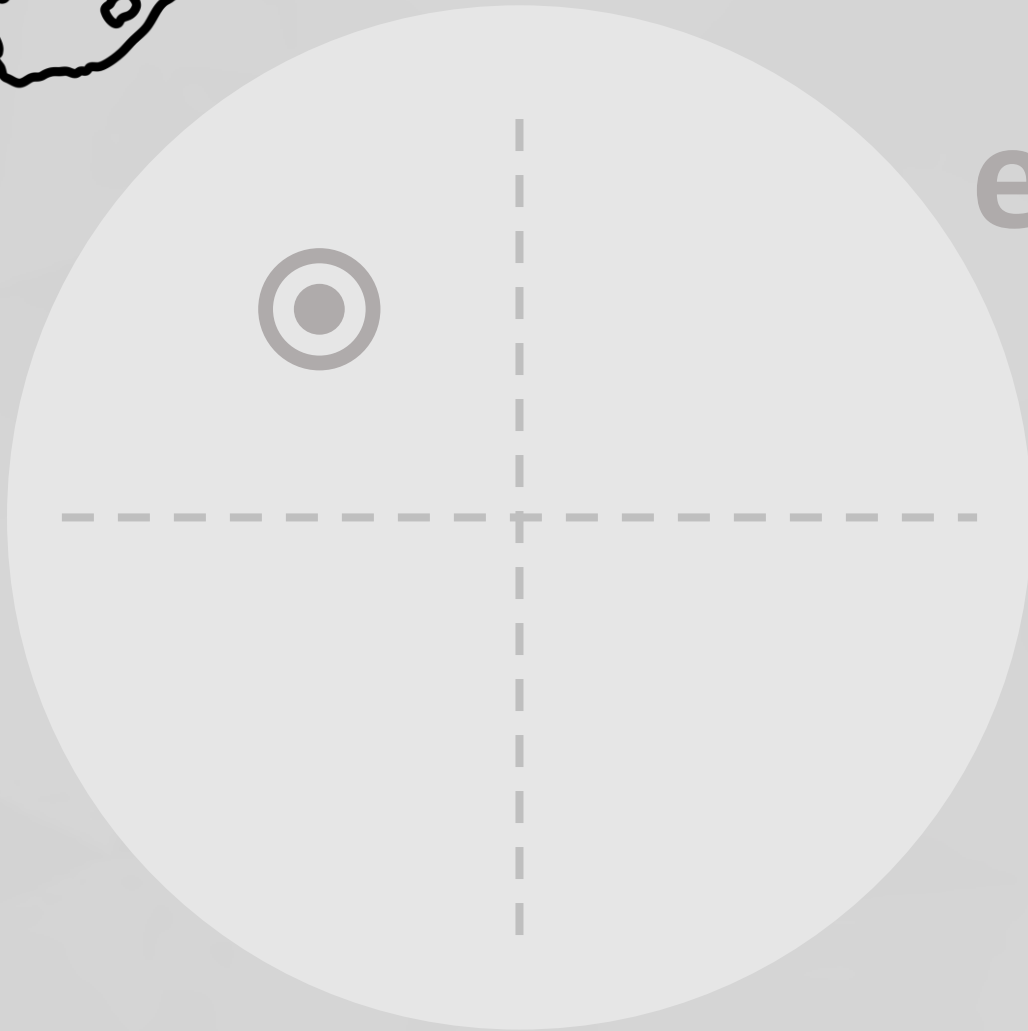
Defeat and economic collapse

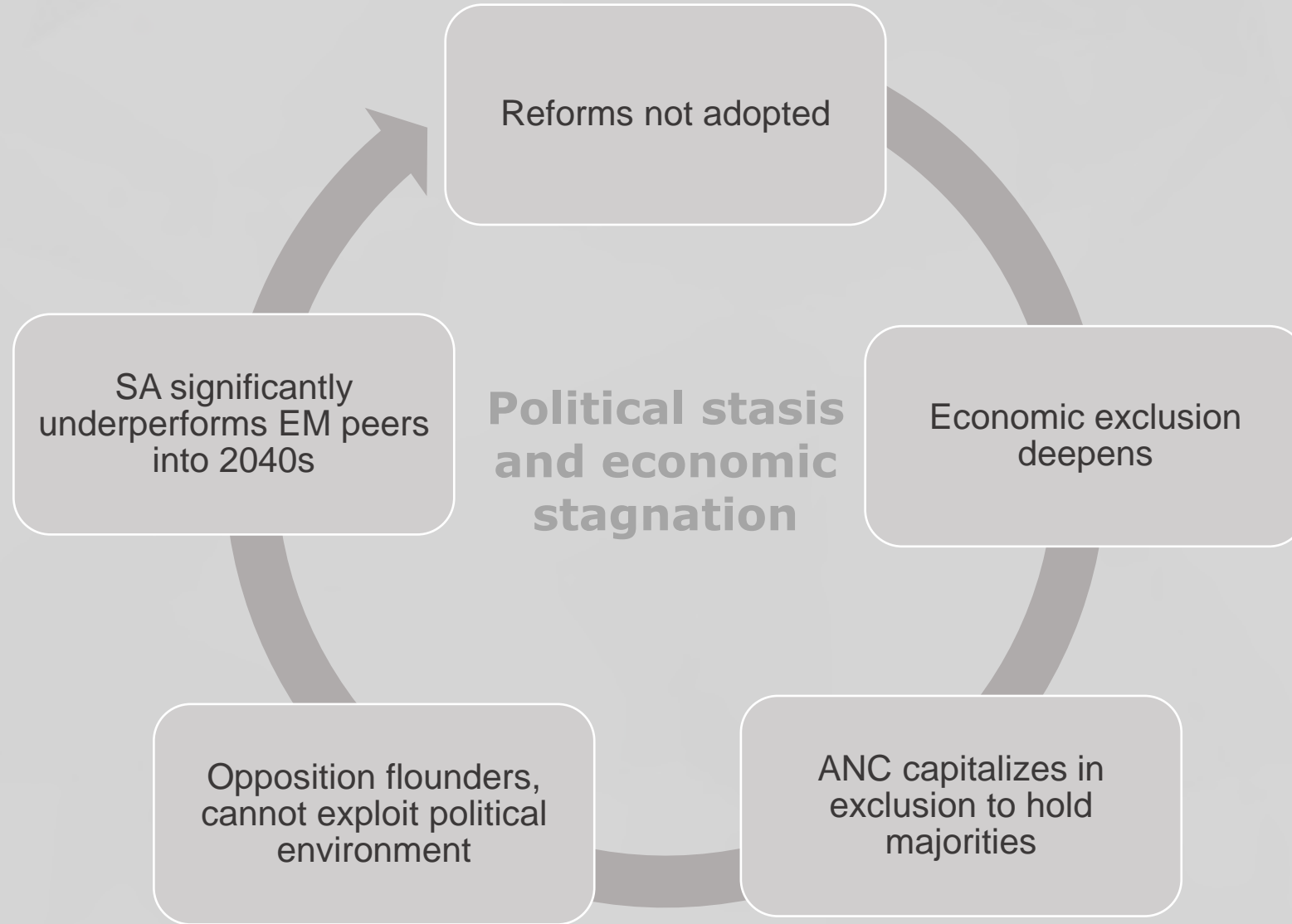






Political stasis and economic stagnation





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