

VARIABLES

The research process generated 25 variables that participants believe will most shape South Africa's future over the next decade. These are:

1. We will struggle to absorb low-skilled labour in the industrial sector but will see improved absorption in high-skilled and service sectors.
2. Despite improved labour protection, factors such as job losses, wage decreases, automation and casualisation will deepen the insecurity of workers.
3. Continuing high rates of youth unemployment.
4. The South African middle class will continue to be a small and volatile group.
5. Overall inequality will remain high.
6. Non-communicable chronic illnesses will become South Africa's leading cause of death, compounding the HIV/AIDS and TB burdens.
7. South Africa will remain a high emitter of CO² and effects of climate change will not be adequately addressed, further widening inequality.
8. Land reform will be negotiated through elite competition.
9. Urbanisation will accelerate alongside rural poverty.
10. Current social welfare regimes will continue to marginally alleviate poverty.
11. We will see steady improvement in early childhood development.
12. We will see continued success in access to education, while concerns over quality and equity persist.
13. Increased funding for (and access to) tertiary education will see greater youth absorption into the economy.
14. Civil society will continue to hold the State accountable.
15. The number of single parents and female-headed households will increase.
16. While the overall crime rate will stabilise, particular crimes will escalate, with women, children and the poor remaining disproportionately targeted.
17. South Africans will wrestle over the Constitution.
18. Without meaningful reconciliation, we will see intensified resentment and resistance.
19. Investigative journalists will continue to hold the state to account.
20. State capacity will remain weak but it will be more inhibiting of corruption.
21. Political leadership will be expressed through increased coalitions and a rising youth voice.
22. We will see an increased commitment to long-term thinking in policymaking.
23. Regional trade and investment will continue to improve, with regional immigration as a major area of contestation.
24. Social solidarity and sacrifice, albeit contested, become more central South African values.
25. South Africans will, on balance, benefit from southern African growth and BRICS membership.

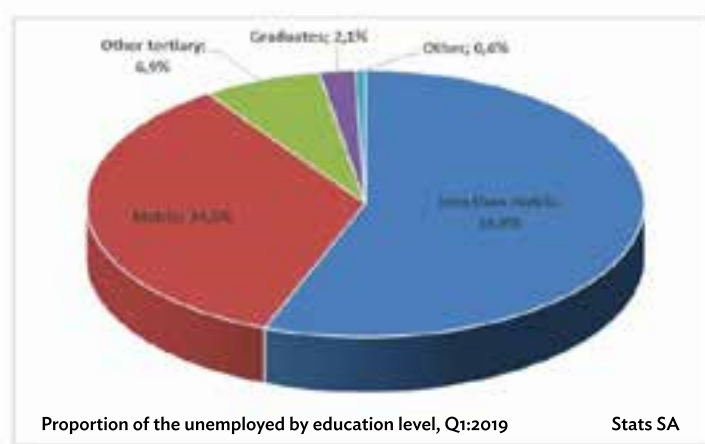
1. South Africa will struggle to absorb low-skilled labour in the industrial sector but may see greater absorption in high-skilled and service sectors

In early 2018, as these scenarios were being developed, 16.2 million South Africans of working age (15 to 65) had jobs. But 6.1 million South Africans could not find work. Unemployment on the 'narrow definition' stood at 27.5% with the rate of unemployment increasing every year since 2008. These trends continued into 2019. The generational impact of apartheid education – designed for servitude and deliberately providing only limiting knowledge and skills – continues to reverberate in South Africa's employment statistics, even in 2019. About 20% of South Africans aged between 35 and 64 cannot read and write, and just 30.7% of all South Africans over the age of 25 have completed high school. While more than 90% of younger South Africans are literate, school-leavers often don't have the mathematical skills to enter the higher-skilled service sector positions that are on offer in the economy.

The two main industries that once absorbed high numbers of low-skilled labour are now in steep decline: from its peak of 760,000 jobs in the late 1980s,

the total number of jobs in mining now stands at 460,000. Although some mining sectors have added tens of thousands of jobs since 1994 – particularly the Platinum Group Metals and coal mining sectors – gold mining employment has declined from 360,000 workers at the dawn of democracy to just 100,000 gold mining jobs now.

Agricultural employment is also down



from its early 1990s levels, although some areas such as marketing, gardening and game farming have shown solid employment growth, fishing and ocean-related jobs are in steady decline.

South Africa's economy is, of course, characterised by multiple and deep path dependencies and high levels of concentration of ownership. The Competition Commission has reported that in a large number of key markets, a single firm can have a market share in excess of 45%, which, coupled with significant barriers to entry, stalls in-

novation and job creation. And we are creating less diverse products – 60% of our merchandise exports are now from resource-based industries (CCRED 2018).

Substantial research suggests that the growth of smaller businesses in South Africa could create both skilled and unskilled employment at scale. Currently, small businesses are only generating

about 30% of South African jobs, well below global averages for job creation by small companies. How can South Africa better encourage and support start-ups and small businesses that employ 5 to 15 people?

2. Despite improved labour protection, job losses, wage decreases, automation and casualisation will deepen the insecurity of workers

About six million South Africans are currently looking for work unsuccessfully each month. About another 2.8 million want to work, but have stopped seeking work on a regular monthly basis, often because of high transport and other costs. Unemployment has become deeply entrenched and systemic. According to Stats SA almost 40% of unemployed South Africans had never had a job before. For this younger unemployed cohort, those aged

between 15 and 34, more than 60% had never worked in any job before.

With the highest youth unemployment levels in the world, and despite multiple government employment-boosting plans over the past 25 years, the economy has effectively created no new jobs in the past three years, sending South Africa's unemployment levels to their highest levels since the early 2000s.

Many blame post-1994 labour laws that make it difficult for employees to remove unproductive workers and, critics say, facilitates protracted strikes that deter investment. But equally persuasive voices suggest that there is nothing particularly onerous about South African labour law compared to global standards, and that job creation is being stymied by other factors, such as the complex 'red tape' involved in starting and running a business, as well as South Africa's poor schooling system and the poor health of many. An unfavourable investment climate has also been seen about a trillion rands being held by

corporate South Africa and not made available for investment.

Others argue that only large-scale structural changes to the economy will create jobs in the numbers needed, calling for the nationalisation of mines, banks and large-scale agriculture.

Many who *do* have jobs are very poorly paid, and prone to abrupt lay-offs during economic downturns. The roll-out of the national minimum wage (NMW) – set at R3 500 per month or R20 per hour – is a policy response that tries to enhance the liveability of wages

in sectors like security and domestic work. While these changes aim to improve job security and income levels, even at this low level of R20 per hour, some sectors might see employment numbers decline, at least in the short term. As unionisation in the private sectors declines sharply (from 36% in 1997 to just 16% in 2019), public sector unionisation has surged to nearly 70% of government workers.

These unionisation trends are creating better wages and greater protection for the public sector workforce but a likely increase in precarious types of employment in the private sector. The informal sector is also likely to grow

And this include so-called discouraged work seekers.

These 40% of young people neither employed nor in education or training often remain unemployed for very long periods of time, with new jobs increasingly going to those with a good tertiary qualification.

In 2019, almost 40% of jobs advertised in South Africa require a degree or diploma equivalent and this 'entry level' is rising annually.

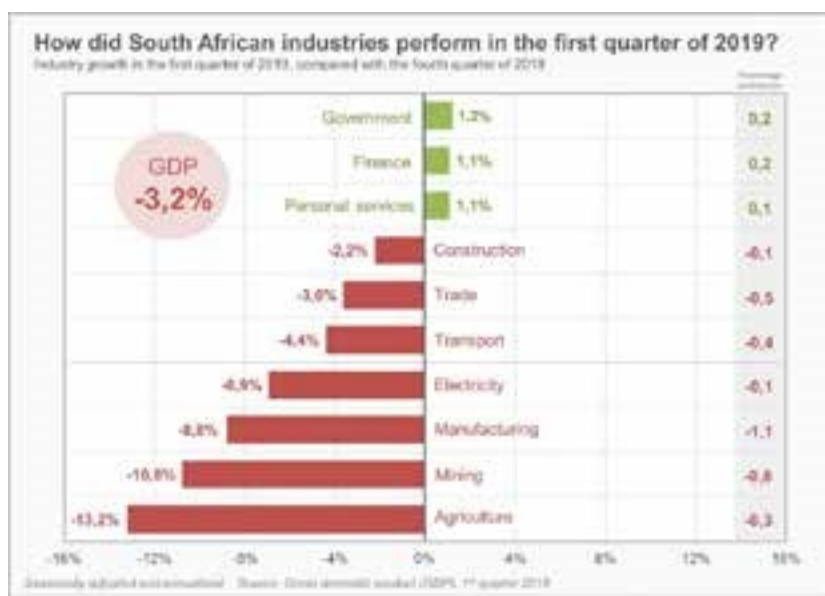
Despite multiple training programmes, and a lot of initiatives to support youth-run business such as Fit for

Life, Fit for Work, the Harambee Youth Employment Accelerator, and the NYDA which works with young people to get them into employment and improve their skills, less than 30% manage to find work or start their own business after such training interventions.

Only the Employment Tax Incentive (ETI)

scheme has shown some ability to impact on youth unemployment at scale, but its implementation has been fiercely opposed by organised labour, which feared employers replacing seasoned workers with subsidised youth. The scheme's first phase still requires careful assessment.

This profound lack of employment and opportunities to earn legitimate income translates into high rates of youth anomie, including alcoholism and drug abuse, involvement with crime, sexual violence, and high rates of new STIs including AIDS. As many analysts and



substantially, as formal employment continues to stagnate.

3. Continuing high rates of unemployment among youth will render a large portion of the population highly vulnerable

As of the second quarter of 2018, when the *Indlulamithi* Scenarios were created, South Africa's youth unemployment rate was 38.8%, compared to 17.9% adults overall. By early 2019, the youth unemployment rate had increased to 39.6%, meaning that 4 out of 10 young South Africans cannot find work.

the National Development Plan are at pains to point out, the unmet expectations and generational resentments of this young 'precariat' drives high levels of social unrest and populist movements. Many young people in South Africa (and across Africa) find themselves in a period of 'waithood', unable to take up adult roles due to protracted periods of exclusion, dependence and vulnerability. As the NDP diagnostic report made clear in 2011, youth unemployment is South Africa's most dangerous 'ticking timebomb'. How might this ongoing human tragedy – of South Africa having the highest rate of youth unemployment in the world – be best diffused?

4. The South African middle-class will be a growing, but nevertheless small and volatile, group

While the middle class in South

Africa has grown in size since 1994, it remains small and insecure compared to comparator countries and to global averages. Only about 30% of South Africans self-describe themselves as middle class. Other measures, such as banking-based estimates of South Africans with a net worth of over R100,000, also suggest a middle class of about 30% of the population.

Increased access to credit, together with greater availability of private and low-fee education for their children,

and the partial success and expansion of the 'second wave' of implementation of Broad Based Black Economic Empowerment (BBBEE), has seen the black middle class grow and solidify.

But many of those in the middle class are deeply in debt, have little access to inherited wealth, and are not well insured or are confident, regular savers. With more than 60% of SA's popula-

tion living in poverty and high rates of unemployment, the black middle class has to support many more dependents than most people do in other countries. Many would be unable to maintain their middle class status if they lost their job, even if just temporarily.

Among black South Africans, the more 'vulnerable' section of the middle class is a larger group than the more 'stable' portion. Indeed, some estimate the stable section of the middle class might make up less than 15% of the South Af-

rican population, including more than 90% of the white and Indian South Africans.

Congregating in increasingly non-racial 'gated communities' in large cities, South Africa's middle class, whatever its size, is forging an identity somewhat isolated from the realities faced by the vast majority of South Africans.

5. Overall inequality will remain entrenched, driven by inequality in assets and access

When, in May 2019, Time featured South Africa on its cover with the headline 'The world's most unequal country', and a striking aerial photo showing the contrast in conditions and density between Primrose and Makause in Johannesburg, it again brought to the world's (and South Africa's) attention is the fact that our Gini coefficient continues to worsen. About 10% of the South African population, based on current research, owns about 90% of the country's productive assets, and the official Gini coefficient, a key measure of income inequality, stands at 0.63.

With 64% of the African population of South Africa still living in poverty, and only 6% of Indian South Africans and 1% of white South Africa defined as being in these same poverty bands, it is clear that income inequality is deeply racialised and deeply entrenched in South Africa. Poverty is strongly intergenerational and upward mobility is limited. Children of parents in the poorest quintiles are 95% more likely to remain in poverty and 60% of South African children were living below the upper-bound poverty line in 2018. These children not only experience poor health, inadequate nutrition and poor services, they also do not have access to the economic, cultural and



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social capital that might improve their education and employment prospects. Indeed, inequality sets in at a very young age.

Inequality might be the largest spur to a lack of social cohesion and fuels social and political unrest. Higher income countries attempt to tackle inequality, as South Africa has tried, through various forms of social grants or through subsidised or free housing, cheaper or free education. Progressive taxation, inheritance taxes, high minimum wages

6. Non-communicable diseases will become South Africa's leading cause of death, compounding the HIV/AIDS and TB burden

Many South Africans are yet to benefit fully from the progressive healthcare policies introduced in 1994 partly because of sub-standard healthcare and uneven access to services, as well as factors outside of the healthcare sector such as poverty, and poor-quality education. When South Africa became a democracy in 1994, HIV and AIDS

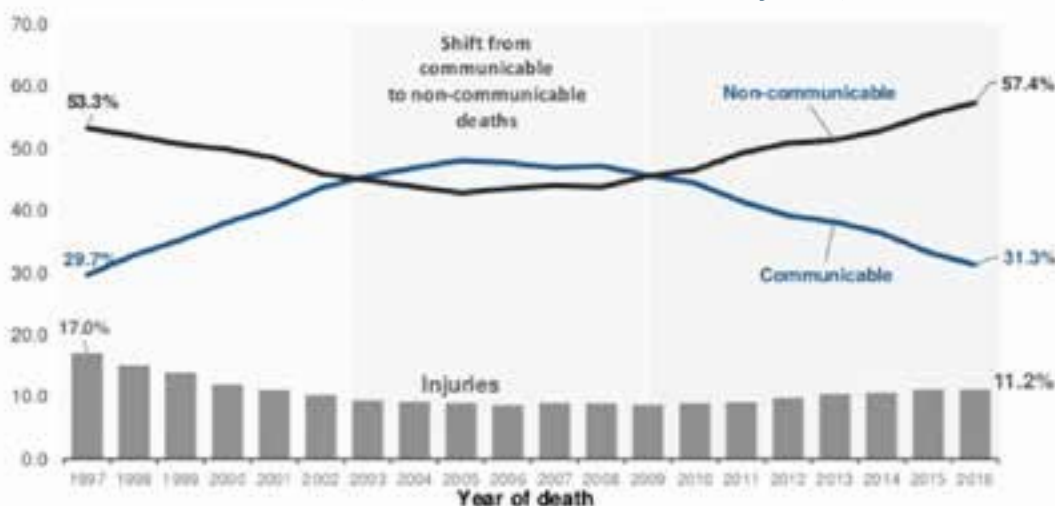
including cardiovascular disease and some cancers. As critically, there has been a surge in the incidence and prevalence of diabetes.

Five million South Africans have 'pre-diabetes' in 2019 – indicative of higher than normal blood sugar – and about 6% of the population have been diagnosed with diabetes. This growing group – now 3.5 million strong – require substantial medical resources, including a daily treatment regime and medication, regular monitoring and a lot of support and education.

Diabetes is now the second most common cause of death in South Africa.

The burden on the health care system is substantial and growing. Because of poor symptom awareness, and slow development of the disease, more than a third of those diagnosed with diabetes already have complications requiring rapid medical intervention when they are diagnosed.

Deaths: Communicable, Non-communicable and injuries, 1997-2016



and the social mobility opportunities of better early childhood programmes do not offer as much promise in South Africa because of high levels of unemployment, a comparatively small tax base and a currently stalled economy.

For many analysts, South Africa will remain the global leader in terms of income inequality unless the education system, which prevents upward mobility by denying the poor access to higher skilled, and better paid, jobs, is thoroughly overhauled and reformed

affected about 1% of the population. By 2010, almost 20% of adult South Africans were HIV positive, a rate that has remained high despite the rolling out of the world's largest anti-retroviral programme. New testing and treatment regimes have stabilised HIV infection prevalence and reduced incidence substantially.

However, on average, South Africans' waistlines have increased substantially. One third of South Africans are now overweight or obese, and the proportion of children who are obese is rising sharply in urban areas. This has dramatically increased incidence of serious illnesses that are connected to and correlated with excess weight,

South Africa's health system is wilting in the face of these epidemics of both communicable and non-communicable diseases, and despite shifts of funds to more preventative Community Health Worker programmes, South Africa's health system is still mostly curative and secondary, rather than preventative and primary.

Achieving the 90/90/90 goals, i.e. getting 90% of people living with HIV to know their status, to get 90% of all those with HIV onto antiretroviral therapy then to get 90% of those on antiretroviral therapy to be virally suppressed and have no measurable HIV in their bloodstream, is proving elusive

in South Africa. Treatment adherence rates for HIV and diabetes need to be increased substantially, which will require the training and hiring of many more health care workers, education and outreach.

Mental health also forms part of the burden of NCDs and South Africa has very high rates of depression, anxiety and substance abuse and addiction. NCD patients are more likely to die if they suffer from mental illness, and babies born to a depressed mother are more likely to suffer developmental problems.

7. South Africa will remain one of the highest global emitters of carbon dioxide per capita and the effects of climate change will still not be addressed adequately, further widening the inequality gap.

South Africa's average carbon emissions are currently at 8.9 tons per capita, which is among the highest per capita emissions in the developing world. The global average is 4.9 tons per capita per annum. In 2014, coal made up 70% of South Africa's primary energy consumption, well above the global average of 30%, partly because about a third of South Africa's liquid fuel is produced from coal by companies such as SASOL.

Climate change is already impacting South Africa. It is estimated that, by 2030, South Africa's water demand will exceed supply by 17%. South Africa is a water scarce country, and climate change is expected to worsen the country's water shortage. South Africa's average annual rainfall is almost half the global average and almost 40% of



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fresh water is lost through decaying water infrastructure and inefficient and leaking pipe systems, particular in smaller municipalities.

Sustained climate change will result in the western parts of the country getting drier and the eastern parts wetter, with predicted increased incidences of tropical disease. 2016 was the hottest year on record globally, with a record 43°C measured in Pretoria. Food security and the lack of potable water affects the poor more than the middle classes. And it is likely that climate change will also result in 'climate refugees' from other African countries seeking safety in South Africa. We may see conflicts over natural resources escalate because of the decreasing resources and increasing demand.

Indeed Africa has relatively low adaptation and coping capacity to climate change and extreme weather effects, and is arguably more vulnerable to impacts of climate change than any other region.

8. Land reform will be negotiated through elite competition between traditional leaders, commercial farmers & the state, with little participation or gains for those whose land rights are most insecure.

Only about 10% of land has been transferred to black owners since 1994, as programmes of restitution, redistribution and policies to improve security and fairness of tenure have floundered, due to lack of funds and high levels of corruption and incompetence.

Many argue that security of tenure has been the most neglected area. Parliament's 2017 High Level Panel Report on the Assessment of Legislation and the Acceleration of Fundamental Change Report, as well as a growing body of work by academic activists, suggests that in many parts of the country, the rural poor continue to be ruled as subjects, as opposed to being treated as citizens.

The Zulu monarchy's attacks on the High-level Panel Report, which

included a recommendation that the Ingonyama Trust be dissolved, is a sign that we will see increased conflict between traditional leaders and government as struggles around land reform rage on.

Positive developments include the Gauteng provincial

government's plan to rapidly redistribute unused small pieces of land that are currently owned by the state to people who can afford to build their homes on them. However, support for restitution and resettlement is likely to remain inadequate. A case in point is Alexandra township, where the families of the old property owners have still not received their title deeds from the post-1994 government after losing them in a 1958 apartheid government expropriation without compensation. This and the ongoing land grabs are signs that we will see increased local-level community action and conflict over land.

It is not yet clear that the recent parliamentary decision to review the constitutional clause on expropriation without compensation will amount to any significant shifts. Some experts suggest that the need to pay compensation has not been a major barrier to land reform. Rather corruption by officials, collusion by elites, a lack of political will, and poor post-settlement support are all considered to have been the major obstacles.

Recent commitments to expropriation without compensation have come with the caveat that food security and economic productivity will need to be protected.



South Africa's most significant long-term environmental challenge may not be water scarcity, but failing sewerage and water treatment plants

The key focus of the land question is likely to remain on rural land, neglecting the rural-urban network and prospects for urban land reform, where well-situated state-owned land could be better earmarked for redistribution.

9. Urbanisation will accelerate, alongside suburban dispersal and the entrenchment of rural poverty.

An estimated 64% of South Africans now live in cities, with rates of urbanisation set to increase faster and further. Despite multiple challenges, many people who move to urban areas are able to generate a better income than they could in the rural areas. For example, twice as many people in rural areas report having run out of money to buy food at least once a month, compared to those in cities.

Rural South Africans are also nearly twice as likely to require and receive social grants. And about half of the workforce in the metros have completed secondary school, compared to roughly one-fifth in rural areas. Tertiary skills are scarce outside the cities. To be confined to marginal spaces has a profound effect on one's life outcomes. South Africans face the longest

commuting distances in the world. And people living in the poorest households are also more likely to live far away from centres of economic activity, and carry the greatest burden of transport costs. As the rate of urbanisation has outpaced the rate of development of new housing, overcrowding in urban areas is

increasing.

Meanwhile, rural areas (and particularly the former homelands) have far higher levels of deprivation than anywhere else and continue to be the poorest places in South Africa.

Regional inequality is likely to become more entrenched, with stark inequalities between urban and rural areas. Nevertheless, many South Africans will continue to be characterised by 'double-rootedness', with households stretching between urban and rural areas and regular travel between them. Urban spatial inequality is likely to remain stark as infrastructure and transport struggle to keep pace, while economic activity is likely to remain as concentrated and as urban as it is in 2019.

10. The current social welfare regime will continue to alleviate extreme poverty

More than 17 million people benefit from social grants, the vast majority of whom are children. These grants – including so-called non-contributory social assistance cash grants such as old-age pensions, disability grants, child support and foster care grants, and care dependency and war veterans grants have contributed to substantially alle-

viating poverty. As individuals receiving grants increased from only 13% of the population in the early 2000s, to more than 30% of the population by 2017, the number of households experiencing hunger decreased from 24.2% in 2002 to 10.4% in 2017. This is a solid indicator that these cash transfers are having a positive impact.

By early 2019, at least 43% of households in South Africa received at least one social grant. However, there is still a great need, and

social grants have not kept up with inflation. A shift toward a more substantial welfare system in the country is unlikely for the foreseeable future due to the prioritisation of reducing the current national deficit and the introduction and roll-out of free higher education. Social grants may become increasingly unaffordable if economic growth remains slow and the number of grant beneficiaries continues to rise. While the social grants system has had a positive impact on poverty alleviation, the wellbeing of children and on women's empowerment, it has not reduced levels of inequality significantly.

The country's social grants system has also been plagued by mismanagement and incompetence as the South African Social Security Agency (SASSA) became embroiled in various dubious schemes. This had stabilised by 2019, with a new minister in charge and with the South Africa Post office providing a cheaper and more reliable distribution system.

11. South Africa will see steady improvement in early childhood development outcomes, with positive implications for early learning and intergenerational poverty.



Partly due to poor infrastructure, in the poorest 80% of schools, only 1% of learners in grade 8 will go on to pass matric and obtain a C symbol or higher (60%) for mathematics and science

Those pupils in Grade R in 2019 will be completing their matric in 2030 if all goes well for them. Since 2000, South Africa has seen a considerable improvement in access to early childhood development (ECD). Grade R, a national system of provision for children aged five to six years, has now been fully implemented.

Various qualifications and career paths now exist to improve the quality of teaching and also establish career paths for ECD teachers.

One of the major challenges to successful ECD interventions is getting consistent collaboration between state departments. While health interventions for ECD are implemented by the state, other programmes rely on NGO support. The ECD NGO sector is overstretched, under-resourced and fragmented.

The National Integrated Early Childhood Development (NIECD) Policy

was approved by Cabinet in 2015 and seeks to introduce, before 2030, a package of birth registration, free basic healthcare and nutrition for pregnant women, infants and young children and various preventive and curative mater-

nal, infant and child nutrition services. Increasingly, free food is provided in some form at public schools and community-based facilities.

Improved nutrition for young children is essential for their immediate wellbeing, but also for its impact on a child's long-term

physical and mental development, which in turn influence

performance at school and labour market productivity as adults. Investing in ECD has been proven to be one of the most effective means of alleviating poverty in the long term as the first 1000 days of a child's life determine much of a child's future development pathways

12. There will be continued success in access to basic education but concerns over quality and equity will persist.

South Africa inherited a deeply unequal and divided education system in 1994, but efforts to improve educational quality and reduce educational inequality has proved elusive. Most children now do get to attend primary school, as enrolment approaches 100%, but quality of education for most black children remains inadequate.

In many poorer and mostly black communities, schools are still substandard. Poor communities also cannot support

their schools and school governing bodies to the same extent as wealthier communities.

While South Africa's great success – getting almost 100% of children into formal primary schooling at the appropriate age, and keeping primary school drop-out rates low – less than half of any given Grade 1 cohort goes on to pass matric and complete schooling successfully.

In the poorest 80% of schools, only 1% of learners in Grade 8 will go on to pass matric and obtain a C symbol or higher (60%) for mathematics and science.

As good maths and science marks

are prerequisites for most degree programmes at university, poor pupils, mostly black, are disadvantaged.

The role of teacher unions requires considerable attention, as the Volmink Report of 2016

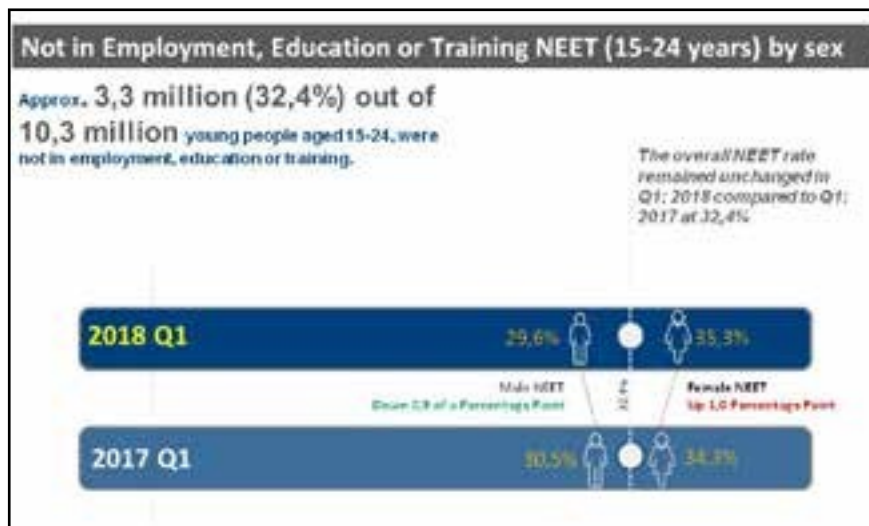
found widespread corruption and abuse – including widespread schemes of teachers paying union officials for job placements. The report provides extensive evidence that teacher unions have 'captured' education departments in some provinces, which adversely affects teacher quality and impedes efficient school governance.

An emerging key issue is that mother-tongue education in the early grades has been shown to significantly improve school outcomes. Current policy proposals recommend that the first three grades are taught in the learners' mother tongue across South Africa, with school governing bodies

(SGBs) deciding on when to transition to English.

The use of mother-tongue teaching is inhibited by a lack of resources, poor support from curriculum developers, poor teacher support and inadequate training. Shifting of resources to the first three to six years of schooling could greatly improve high school outcomes, and even university through-put rates.

13. Increased access to tertiary education will result, over time, in greater youth absorption into the skills-biased economy.



Almost one million students are now enrolled in South Africa's universities with approximately a further 800,000 studying in vocationally oriented TVET colleges. At universities, nearly 60% of all students are women, and about 70% are black South Africans.

Universities in particular are 'full' as only 26% of students are currently able to complete their bachelor degrees in the requisite times, and many have to add an extra year or two to the time needed to complete their degrees.

More than 200,000 students graduated from all universities in South Africa in 2018, up from about 160,000 grad-

uates a year in early 2010. But TVET and private college graduations – at around 150,000 students per year – are not keeping pace with the needs of the South African economy. Students prefer trying to get into universities (despite high failure rates and high non-complete rates) as TVET colleges have a poor reputation in some areas.

In response to the Fees Must Fall protests, government announced in December 2017 new policies to subsidise free higher education for poor and working-class students. Students studying at TVET colleges started to receive fully subsidised free education and training in 2018, while students at

university, who come from households with combined incomes of less than R350 000 per annum are now funded for the entire formal costs of a first degree.

The Indlulamithi youth focus groups highlighted many issues with the struggling TVET sector, including the struggle of many TVET graduates

to find jobs with the qualifications obtained. It is possible that if the policy on free education for poor students is not successful, protests may reignite.

Five South African universities are included in all the various rankings of the world's top 500 rankings, including the University of the Witwatersrand, the University of Cape Town, Stellenbosch University, the University of Johannesburg and the University of KwaZulu-Natal.

14. Civil society will continue to hold the state accountable and provide essential services.

Civil society is a contested concept: it includes various forms of social involvement, such as serving on School Governing Bodies, or attending Community Police Forums. There are 54,000 NGOs registered in South Africa and, as such, they form a large part of civil society. Other contributors include trade unions, political parties and religious organisations.



Government has an ambivalent relationship with many NGOs, even those that help with critical service delivery. This leads to many protests

These organisations collectively have helped hold the state accountable since 1994 and particularly in the 2010s as ‘state capture’ of many government institutions and State Owned Enterprises (SOEs) provoked a mass mobilisation of civil society, which, within courageous journalism, helped change government in South Africa after President Zuma resigned in February 2018.

Government has an ambivalent relationship with many NGOs, even those that help with critical service delivery. Because NGOs are ‘mediating’ institutions – helping people deal with government, in terms of claiming their rights and understanding their responsibilities – this can cause friction with government, especially when many NGOs also get some of their funding from the state.

The importance of NGOs and the role they play in development is often underestimated in South Africa. In rural areas in particular, NGOs play a critical role in partnering with government to deliver services. Many NGOs work tirelessly to promote democracy and

good governance, or the prevention of gender-based violence.

Faith-based organisations are also very influential in South Africa, and are playing an important role in promoting social cohesion and collective ethics. However, a relatively new trend, which has seen the commercialisation of religion, and the rise of so-called ‘charismatic churches’, may contribute to instability, especially under conditions of worsening poverty and inequality.

NGOs are an expression of the values and serve real needs of people in society. Public policy in South Africa should recognise, respect and, where possible, empower these institutions better in future.

15. Female-headed households will become more entrenched, while household size decreases.

Only 34.5% of households in South Africa are composed of a mother, father and children. Many families are headed by grandparents, as a generation of South Africans have experienced

high mortality rates due to HIV and AIDS-related deaths.

The second most common household formation in the country is that of the female-headed household (36.7%), run by single mothers. The HSRC estimates that 60% of children in South Africa thus live without their fathers. These female-headed homes are significantly more likely to be impacted by poverty.

Child-headed households are the most vulnerable family composition and are most prevalent in KwaZulu-Natal, Limpopo and the Eastern Cape. The legalisation of same-sex marriage in 2006 has seen rising numbers of same-sex households in South Africa (from 80 registered civil marriages in 2007 to 1158 registered in 2015).

While the number of households headed by fathers is low at 0.3%, there has been a marginal increase in father-headed households, some with the support of their extended families. Many *Indlulamithi* participants highlighted the family as a starting point for

building social cohesion. Family values influence individual behaviour, and impact on how people interact and behave in the community and in society.

But the Medical Research Council estimates that 1 in 5 women in South Africa has experienced violence at the hands of a partner. To add to this, the Children's Institute reported that up to 34% of South Africa's children were victims of physical or sexual abuse before the age of 18. Funding for organisations that support victims of domestic violence is on the decline and the rate of prosecution of offenders is low and falling.

With high numbers of female-headed households, high unemployment and declining marriage rates, men are less likely to be linked to families in the future. What might the implications of this social disconnectedness be?

16. While overall crime will stabilise, particular crimes will escalate, with women, children and the poor remaining key targets.

After falling for a decade, crime rates, particularly for some types of 'contact crimes' like murder, started to increase from around 2013. Murder is regarded by criminologists as the most reported and accurately captured of all crimes, and for South Africa in 2017/2018, the alarming news was that more than 20,000 murders took place over a 12-month period, equating to 57 per day. Sexual violence, especially reported rapes, increased to more than 40,000 per year in 2017/18 or more than 110 per day.

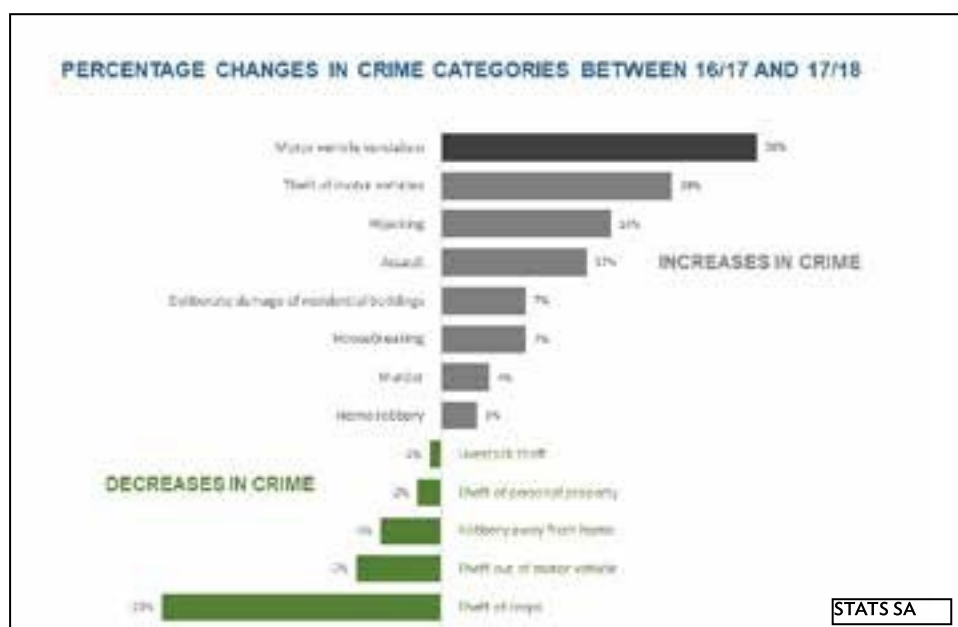
But overall, the total number of crimes recorded has come down steeply from 2010, with around 2 million crimes – of all kinds – recorded in the last measured in 2017/18.

Given that the global average murder rate is less than 5 per 100,000 per year, South Africa's murder rate of 37.5 per 100,000 people per year is at seven times the global average. South Africa regularly ranks in the top 10 of all countries for 'intentional homicide', on lists that includes countries at war. Some areas of South Africa far exceed the annual 'intentional homicide rate' even of countries at war: the worst death rate in the world in 2017 was in Syria, with over 200 deaths per 100,000 people per year, but Philippi East in Cape Town had a murder rate of or about 320 per 100,000! Even Madeira in the

lence, especially that reported in South Africa, ranks poorly in terms of intimate partner violence and femicide, i.e. the murder of women because of their gender in South Africa is five times the global average.

New police and prosecutorial leadership, a stronger and better resourced NPA, and better crime intelligence structures appear to be stabilising crime rates, but at the current very high levels.

Much more needs to be done. Crime deters investment and it also prevents



Eastern Cape managed to see more people murdered than Syria's average, with a murder rate of 214 per 100,000 per year. Pietermaritzburg's central city police station recorded 177 deaths per 100,000 people per year in 2016/17. Income inequality, deep legacies and wounds of apartheid, and the reality of the more than 60% of black South Africans living in poverty, has made South Africa one of the most stressed and dangerous countries to live in, in the world. Women and children suffer in particular: South Africa has high levels of violence at schools and in communities directed at children. Sexual vio-

township economies from taking off, as cash businesses in poor areas are frequent targets of crime. Crimes against business are currently the fastest growing types of crime, including cash-in-transit heists and robberies at businesses. Cybercrime and fraud are also trending sharply upwards in South Africa and will require special attention and new dedicated units to curb their further expansion.

The feeling that crime causes insecurity has instilled a deep fear in many people, which perpetuates isolation as people retreat into their private spaces

instead of interacting with others in public spaces. This makes achieving social cohesion more challenging.

17. South Africans will wrestle over the Constitution, putting national identity in flux.

The Constitution is still regarded as one of the greatest successes of the democratic transition. In addition to framing national identity and values, many believe the Constitution had an indirect effect on the country's ability to avoid civil war and maintain a semblance of social stability. Some *Indlulamithi* participants believed that social cohesion should be built around the aspirations, ethics and values enshrined in the Constitution. Others, however, identified growing debate around the Constitution and its effects.

Critics of the Constitution have raised concerns about its failure to enable the transformation of socio-economic conditions for those previously disadvantaged by the apartheid regime. Some regard the Constitution as a 'compromised settlement' designed to entrench white privilege, protecting, as the Constitution does, the property ownership regime then in place, in the 1990s. With the land debate ongoing in 2018, it is unknown whether changes to Section 25 of the Constitution, following the passing of a motion on land expropriation without expropriation in Parliament will be implemented, or whether the land reform policy implementation will happen within the existing Constitutional framework.

But key constitutional challenges over the past two decades have resulted in a significant number of gains for those at the margins of society. Rights to housing, safe abortions, anti-retroviral treatments, same sex marriage, freedom of the media and freedom of expression, the abolition of the death penalty, the rights of migrants, and communities' ability to influence the awarding of mining rights are among the many significant legal achievements that have advanced human rights and dignity in South Africa.



The ANC struggles to retain credibility with the electorate

The courts have also played an important role in enforcing socio-economic reforms and in checking state capture, criminality and looting of government resources. The Constitution and the judiciary remain among the most respected of all South African institutions.

18. Successes and failures of reconciliation will be determined by our attitudes towards history, race and social cohesion.

Only 56.1% of South Africans agree that South Africa has made progress in reconciliation since the end of apartheid, according to the 2017 edition of the South African Reconciliation Barometer Survey report, prepared by the Institute for Justice and Reconciliation. The report goes to show, from

large scale and carefully calibrated surveys, that "fewer than half of South Africans report that their friends and family have experienced reconciliation after the end of apartheid". Almost two thirds of South Africans believe that "reconciliation is impossible for as long as people who were disadvantaged under apartheid remain poor".

Many *Indlulamithi* participants have argued that South Africa remains a wounded society, in which commitment to reconciliation is superficial.

This woundedness has implications for relationships between generations, the nature of identity politics, perceptions of justice and our ability to plan for the future.

A large number of respondents believed that the government has not done enough to address the challenge of trauma as faced

by them. Many South Africans believe the Truth and Reconciliation Commission (TRC) also did not do enough to address the collective trauma of colonialism and apartheid.

From many young people, key matters of redress have not been spoken about for fear of upsetting the transition. There are, they say, too many 'silent non-agreements' that fuel ongoing fear and mistrust between races, classes, genders and generations in South Africa. Some *Indlulamithi* participants attribute deepening racial resentments and emerging racial populisms to our inability to confront the legacies of the past.

19. Investigative journalists will continue to hold the state to account. Meanwhile access to information will improve, alongside concerns of a post-truth era.

A key role of the South African news media post-1994 has been that of a guardian of democratic norms, i.e. a 'watchdog' role. In the past decade in particular, the news media has made a major contribution to exposing corruption and 'state capture' and has been able to hold at least some of those in power accountable to the public.

But South Africa's news media has seen its business models disrupted by the increasing popularity of digital media. As South Africa has crossed the 50% level, in terms of portion of the population regularly online, and as more than half of South African adults now have 'smartphones' (as of 2018), newspaper circulations and revenues have continued to fall.

The SABC, a major target of those in the Zuma/Gupta nexus of power, has also seen revenues fall sharply in recent years. The SABC is technically bankrupt, and requires billions of Rands in state guarantees, to upgrade its increasingly derelict equipment and buildings.

While more South Africans can access the internet (despite high prices for data and connectivity), free radio remains by far the most popular way to stay informed and the get the news in

South Africa. The Broadcast Research Council of South Africa (BRC) estimates that South Africa has 38 million radio listeners and around 29 million tune in every day. No other medium comes close! Many South Africans listen to the radio more than three hours a day.

But millions of South Africans have joined social media networks and increasingly use platforms such as



While more South Africans can access the internet (despite high prices for data and connectivity), free radio remains by far the most popular way to stay informed and the get the news in South Africa

WhatsApp, Facebook and Twitter as their preferred first choices for entertainment and especially for breaking news. These channels provide South Africans with direct access to news and, with the sustained popularity of talk radio, this has allowed many more people to participate in the public discourse.

But concerns about the vibrancy of the public sphere and the spread of fake news and the 'weaponisation' of social media against those who investigate or call out corruption, has become acute. As South Africans have found out, the Gupta and Zuma families' now-defunct media empire also extracted hundreds of millions of rands from SOEs, government departments and even from

the largest media company in South Africa, Naspers, via their subsidiary MultiChoice.

Fortunately, with the closure of Gupta/Zuma families' media empire (and the flight of the Zuma/Gupta brothers out of South Africa in 2017), South Africa's news media now finds the playing fields more level, in terms of access to government media marketing budgets and access to government communicators.

To avoid South Africa succumbing to a 'post-truth era', the declining diversity and density of South African news media requires strong intervention from the public and the government.

The Media Development and Diversity Agency (MDDA) is dysfunctional and has been mired in maladministration

and corruption. Hundreds of struggling community radio stations and newspaper could be helped to survive if the MDDA was properly run and given a more substantial budget and more funds to disperse to regional and local media in particular.

The SABC now has more freedom from political interference than has been the case since the 1990s, but it needs large infusions of capital and more consistent political support. Further waves of retrenchments in both the public broadcaster and in private news media are unfortunately more likely than not. South African citizens have to stand up and demand the right to know, and the right to be informed (and entertained and educated), so that the SABC, with

its multiple TV and radio channels, can survive and flourish.

20. State capacity will remain weak, there will be more decisive action taken to improve the performance of State Owned Enterprises and reduce the corruption of the state.

A number of global and World Bank studies show that South Africa's state capacity – the state's ability to deliver services and implement policies and programmes – is worsening because of systemic corruption, lack of accountability and poor skills. State capacity is shaped by several factors, including educated, skilled, experienced, committed public service, who are steeped in the ethos of public service employees, who work in a transparent and accountable political system in which public representatives lead by example.

In the 2010s, what some analysts described as a 'shadow state' – a parasitic network that purloined state resources and extracted billions of Rands – started taking root in South Africa. This resulted in the erosion of state capacity and the decline in public trust in the state and in some of its key institutions. More so, the loss of public confidence in the South African Revenue Service (SARS) reduced tax compliance and saw tax revenues fall precipitously. Financial institutions and local and international investors also became increasingly reluctant to invest in the country.

SOEs are also a particular cause for concern with dozens of reports over



For many young people, the promises of 1994 have not been fully realised and youth unemployment is the highest of any country in the world

the years outlining the gross mismanagement and corruption at a number of SOEs. Frustration has been expressed at the repeated government bailouts granted to the South African Airways (SAA), with sentiments expressed that such 'rescue' missions do not encourage accountability, but can rather worsen mismanagement.

Successfully reversing the erosion of state capacity will require greater levels of accountability, more transparency, greater respect for rule of law and a much more professional civil service. A concerted, sustained, multi-level effort to fight corruption and prosecute offenders at any level of government is also urgently needed.

21. Leadership will be expressed through increased coalitions, a rising youth voice and a 'noisy democracy'.

Out of 55 million South Africans, 20 million are young people between the ages of 15 and 34 – more than a third of the population. South Africa's median age is 27!

For many young people, the promises of 1994 have not been fully realised and youth unemployment is the highest of any country in the world. Youth voices are rising, on campuses, in schools and at the ballot box, partly in response to the lack of employment opportunities, and partly because of other pressing issues, such as persistently high crime rates and poor education. The 'capture' by corrupt forces and the decline of the ANC Youth League over the past decade has also seen many young people gravitate to other political formations or, more ominously, withdraw from formal politics and participation in elections. The 2019 elections saw the lowest youth participation rate ever in the democratic era.

The local government elections in 2016 saw the ANC lose voter share and face what appeared to be voter 'boycotts': in four of the eight large urban metros, The ANC lost control of the councils it had once led. However, neither of the two major opposition parties – the Democratic Alliance (DA) and the Economic Freedom Fighters (EFF) – got enough votes to gain outright

control of any Metro. This has led to hung councils and fractious coalitions in these four metros and in many other areas elsewhere in the country.

In the 2019 general election for the first time, the ANC received less than 60 percent of the vote. The EFF garnered just over 10% of the vote, becoming the official opposition in three provinces. The DA lost half a million voters,

and, all in all, 13 parties are now represented in South Africa's 6th parliament.

The ANC's 57.5% share of the votes translates into just a shade over 10 million votes. Losing just a further 2,500,000 votes by 2024 will see the ANC vote share decline to below 50% – and possibly lead to a hung parliament. Only 17,436,144 South Africans voted in 2019 (out of 26,727,921 registered voters). Further disappointment in the ANC and more voter 'stay-aways', and strong performances by the EFF and DA and some smaller parties over the next five years, could shake up South African parliamentary politics in ways never seen before. Democracy is about to get even noisier!

22. There will be more long-term thinking in policymaking.

Indlulamithi participants expressed a great deal of concern about what they perceived as the lack of long-term, strategic thinking in South African policy-making. Many also complain

that policies are not implemented for long enough to accurately assess their performance, as seen in the adoption

would have to take a stronger leadership in delivery.



After the 2019 elections, there is a new commitment to long-term planning and the implementation of the National Development Plan

of various vastly different development strategies in a relatively short time period. In 1994 the Reconstruction and Development Programme (RDP) was introduced to address the inequities caused by the apartheid system and, it was the focus of government's economic policy, placing emphasis on both economic growth and social development for previously disadvantaged groups.

But by 1996 the Growth, Employment and Redistribution (GEAR) strategy was introduced in response to external pressure, rand instability, and concerns over commitment to sound macro-economic policies. And then, in 2005, the Accelerated and Shared Growth Initiative for South Africa (AsgiSA) was introduced to implement the ANC's 2004 election pledges. AsgiSA adopted a more developmental approach while acknowledging the globalised context South Africa operates in. This approach accepted that fiscal stability had to precede economic growth and the view that the state

The National Development Plan, launched in 2011, still provides a comprehensive blueprint for long-term planning in South Africa. Many lament the 'nine lost years' of the Zuma era, where corruption and maladministration distracted key leaders and structures from implementing government plans, and wasted an estimated R100 billion

rand, and possibly more if local level corruption in dysfunctional municipalities is added. This was combined with high opportunity costs as South Africa, for the second time in a decade, missed a major global commodities boom.

But the new 2019 administration appears committed to long-term planning and the revitalisation and implementation of the National Development Plan, better inter-departmental coordination, and a stronger, more coherent economic cluster.

23. Regional trade and investment will continue to improve, with regional immigration as a major site for change and contest.

Following the end of apartheid, South Africa has rapidly expanded economically across the continent, becoming a significant foreign investor in Africa. But much of this expansion has been driven by private corporations rather than spurred by coherent government policy. South African companies took

advantage of their ‘natural’ competitive advantage in terms of size and positioning, as well as the global drive for economic liberalisation and deregulation.

Partly because of this, South Africa’s role on the continent has been controversial as it attempts to balance its relative economic strength and pursuit of its interests against its leadership aspirations supported by international expectations of its leadership in Africa. The persistent trade imbalance between South Africa and the rest of the SADC region presents a significant political and socio-economic challenge.

Rejuvenating South Africa’s economy through the promotion of regional integration and cross-border trade and investment has been at the core of South Africa’s external trade policy. Successful trade can contribute to global economic growth which in turn can translate to poverty alleviation and improvement of quality of life and facilitate the spread of technology and ideas.

Integrating Regional Economic Communities (RECs) in Africa presents a substantial challenge given that many economies are very small and poor, resulting in relatively small regional markets, seen in the uneven industrialisation in the SADC region. Furthermore, although SADC member countries generally have relatively sound institutions, efficient markets, and well-developed markets, health

and education indicators are concerning, and levels of technological capability are generally low. The most significant challenges include inefficient government bureaucracy, inadequately educated workforce, poor infrastructure, and lack of access to finance.



The Economist 27 April 2019

Trade is also likely to be affected by the considerable generational shift in leadership that might result in a lack of clear direction as the continent makes the transition from the previous generation of leaders, many of whom were involved in anti-colonial struggles, to a newer generation of leaders who may not necessarily share the same ideologies. Newer issues, such as climate change are also likely to be a major driver of regional trade and migration.

Although South Africa is rightly considered a regional leader, the country’s

domestic priorities mean that it often lacks sufficient resources to fully extend itself to ensure its influence and authority across the region.

24. Social solidarity, and sacrifice, will become more central to South African values.

Many participants in the *Indlulamithi* research process noted that South Africa is a very diverse society which has, over time, seen many instances of ethnic nationalism and particularism, which were in part exacerbated by the apartheid government.

Participants worried that deepening inequality, unemployment and poverty might deepen racial tension, and perhaps inflame gender-based violence. Some spoke of ‘pockets of populism’. A value-based re-imagining of South Africa, many suggested, might be one way of attempting to restrain these forces.

Other *Indlulamithi* participants believed South African society is increasingly characterised by rampant self-interest: a culture of ‘each person for themselves’. This is not only a threat to social cohesion in the long term, but in a society with such high levels of poverty, inequality and unemployment, the notion that we can all ‘make it on our own’ is unrealistic. There is a need for a greater sense of social solidarity.

Twenty-five years into South Africa’s democracy, the call for ‘social cohesion’ remains a prominent feature of political

policy and public discourse. But it has not gone uncontested: some critics interpret the call for ‘cohesion’ as an undemocratic call for ‘unity’, in which citizens hold uniform opinions in the name of patriotism. Others express concern about the superficiality of ‘social cohesion’ – imagining a country in which everyone ‘gets along’, but on highly unequal terms.

These criticisms, in and of themselves, shore up what might be most useful about ‘social cohesion’ – and that is its ability to stir up both the most disquieting, and the most hopeful, aspects of this new democracy.

President Cyril Ramaphosa, in his inaugural speech in 2018, made reference to a Hugh Masekela song entitled ‘Thuma Mina’ which loosely translates into ‘Send Me’. The song embodies the tenets of what a unified nation might look like, where everyone living in South Africa not only works more closely together, but also stands up and accepts responsibility for changing particular elements of our society for the better.

At the same time, there has been a rise in the number of ideologically driven anti-globalisation movements that are opposed to what they perceive to be an encroachment on national sovereignty and the undermining of cultural and economic independence. This is seen most vividly in the Brexit debates and in the debates around greater integration of European countries.

Anti-globalisation sentiment has also been driven by economic imperatives on a micro-social level, as seen with issues such as migration. As the phenomenon of Al Qaeda, ISIS, Boko Haram and Al-Shabaab, among others demonstrate, the spectre of terrorism is growing internationally.

If the South African state does not ensure economic growth and political stability it will, in time, weaken, exposing it to both internal and external threats. With weak governance systems, including crime prevention and law enforcement apparatus, the country’s sovereignty may be compromised both at the political and social levels.

25. South Africans will benefit from Southern African growth and BRICS membership, although the future of BRICS will be uncertain .

Globalisation has impacted in equal measure on governments, citizens and civil society. Economic imperatives have been the stimulus for regional blocks and continental bodies of government to flex their collective economic muscle. People-to-people contacts have also taken a more positive turn, with has helped the fight against cross-border crime.

KEY DRIVING FORCES

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

By mobilising ‘social cohesion’ as a question (even a provocation), the project unearthed a powerful picture of the contemporary South African psyche: one in which mistrust and alienation are endemic. For the more than 150 participants we spoke to, any route to a vibrant economy and stable democracy would demand that we address these social questions: questions of inclusion, justice, participation, and trust, which should ground any meaningful definition of ‘social cohesion’.

Drawing from the combined body of research, we worked collaboratively with *Indlulamithi* participants to derive three Key Driving Forces (KDFs), which are the most likely shapers of the future of social cohesion. These KDFs offer something of a diagnosis of the country’s key social challenges, while also guiding us on priorities for intervention.

KDF 1 Social Inequality

Indlulamithi participants spoke with great depth and complexity about the nature of inequality in South Africa,

which they described as having both material and immaterial facets. South Africans experience stark inequalities in income, access and assets: the distributions of each are heavily informed by race, gender, generation and spatial location. While rooted in a long history of colonialism and apartheid, these inequalities are also propelled by more contemporary forces, including climate change and new technologies, which are rendering certain jobs redundant.

This inequality sets in early. Poor early childhood development is a key determinant of intergenerational poverty. 27% of children in South Africa are stunted, due to inadequate early childhood nutrition. This has implications for physical and cognitive development.

Intergenerational poverty perpetuates long-term structural inequality: if parents are among the poorest quintiles, their children have a 90% chance of being stuck in poverty. Sixty percent of children in South Africa live in households below the upper-bound poverty line.

As a ‘Key Driver’, ‘Social Inequality’ is intended to capture these complex entanglements of social, historical and economic injustice. Below are the major considerations raised by participants:

The top 10% of income earners received 60–65% of total income in South Africa. 10% of South Africans hold 90–95% of the wealth: the biggest long-term driver of inequality. Precisely because of this lack of assets (such as land, property and inheritance), the position of the South African middle class is deeply volatile.

Racial inequality remains stark with white South Africans experiencing better quality of life on all major indices.¹ Meanwhile, intra-race inequality is also increasing.

Women are more likely to be poor than men, and also most affected in times of crisis such as climate change, emerging epidemics and by violent crime. In 2015, one in five South African women experienced intimate partner violence.² Reported rape averages at

¹ Institute for Race Relations (2017) Quality of Life Index.

² South African Demographic and Health Survey 2016

109 per day,³ with a conviction rate as low as 8.4% in 2012.⁴ Like women, LGBTQI+ communities are more likely to be vulnerable and marginalised.

According to Stats SA, **41% of households are currently female-headed.** This number is steadily

increasing. Women's disproportionate access to social welfare, their participation in self-help groups, as well as their increased access to the labour market has contributed to increasingly feminised residential spaces – particularly where children are present. Marriage has also been on a continuous decline, with growing numbers of young women co-habiting and bearing children outside of marriage. Startlingly-high, and rising, rates of unemployment have meant that many men do not find community through work.

This is particularly true of young men. Being a household 'head', or even being able to afford bride wealth, have become more and more difficult. There are important questions to be asked about the social alienation of working-age men, who are increasingly disconnected from homes and workplaces.

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

inequality is further entrenched: people live far from economic centres with high transport costs. Inequality between rural and urban, as well as between different provinces is deepening. Large portions of the country's rural and urban dwellers have insecure tenure and volatile land rights, while land and property ownership remains vastly unequal. Meanwhile, the wealthier are increasingly likely to privatise their lives, seeking private health, education, energy supply, security, transport and entertainment; and renewing passports and licences online. The aspiration is to opt out of public institutions, where

queues are long and services unreliable, leaving little room for public participation or communion.

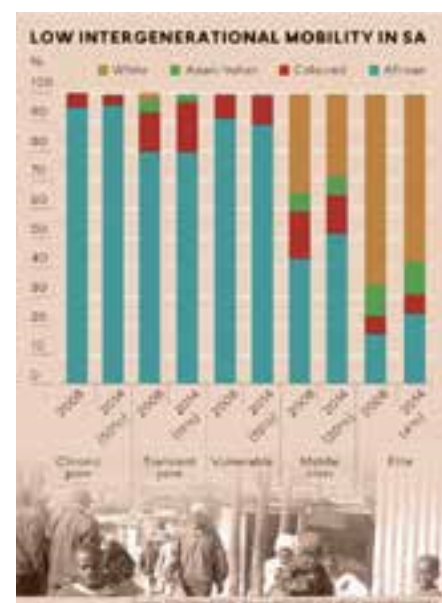
Economic growth strategies will need to be transformative, addressing the root causes of inequality

While access to basic education is now almost 100%, inequalities in the quality of education provided are stark, determined by income, spatial geography and race. Only around half of those who start Grade 1 finish matric.

More than half of young people are unemployed and having a matric does not radically alter their chances of accessing work. If a matric certificate is leveraged towards a tertiary qualification, we see a marked difference in the likelihood of

employment. University graduates are most likely to find jobs, but rates of unemployment are rising among this category too. *Indlulamithi* participants know that inequality will be greatly affected by the future of work, education and the labour market. Whichever economic growth path SA finds itself in over the next twelve years, the stubborn persistence of inequality will need to be taken into account. Economic growth strategies will need to be transformative, addressing the root causes of inequality and inclusive so that more and more South Africans can benefit from such growth.

Finally, social (dis)connectedness was acknowledged as a significant site of inequality in South Africa. Job-seeking youth felt that their biggest barrier to



entry was not knowing the right people. Being networked is essential for getting

³ SAPS Crime Stats 2016/2017

⁴ Mercilene Machisa et al (2017). Rape Justice In South Africa: A Retrospective Study Of The Investigation, Prosecution And Adjudication Of Reported Rape Cases From 2012. Pretoria, South Africa. Gender and Health Research Unit, South African Medical Research Council.

a foot in the door – with a potential employer, landlord, investor, NGO-provider or public servant. Participants recognised both the injustice of patrimonial or nepotistic networks, and the value of social groupings like Stokvels, churches and so on.

KDF 2

Resistance, Resentment and Reconciliation (RRR)

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

This KDF includes the mobilisation around a sense of woundedness and resentment, as well as around ethnicity and culture. It includes fraught struggles for recognition, whether from Afrikaans language activists, black lesbians, Khoisan communities or would-be secessionists, as well as



During 2017/2018, many people in Cape Town had to queue to get water from natural springs

contests over affirmative action and how 'transformation' is legislated. The key questions and concerns explored with participants include 'the effects of an anti-black, unjust world' that have been inherited in the new South African society.

This speaks about the progress of a reconciliatory journey in South Africa and how some young people are

to address the challenge of what they described as "intergenerational" trauma.

We cannot agree on our past.

there was widespread feeling among our participants that South Africans do not have a shared understanding of our history, nor do they agree on who has (or has not) benefitted from the transition. Every race group appeared

SILENT 'NON-AGREEMENTS'

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

beginning to question the journey from apartheid to a maturing democracy. Respondents' feelings of reconciliation were dependent on certain outcomes such as racial justice and genuine social and economic redress. A large number of respondents believed that the government had not done enough

to have a case to make about why post-democratic South Africa does not 'belong' to them, and the mechanisms of exclusion that make them feel unheard. This was often coupled with narratives of resentment against those who were perceived to have benefitted unfairly.

As one participant put it, the country is replete with ‘silent non-agreements’: there are underlying conflicts we do not speak of, so as not to upset the transition. Indeed, as the compromise and fragility of the transition becomes more apparent, so too does the likelihood of its disruption. What would this disruption look like? Would it be good or bad?

There are already moments of rupture in which questions of resentment, resistance and recognition are taking centre stage: mobilisations around decoloniality, mother-tongue education, farm murders, land, institutional racism and so on. Even within these movements, there have been fissures on gender and generational lines. Meanwhile, we have begun to wrestle with our Constitution and its ability to deliver justice, with emerging flashpoints around land, traditional leadership, sexual orientation, sex work, language and access to information. Some might argue that these are the seeds of a more meaningful reconciliation, while others are less optimistic.

KDF 3 Institutional and Leadership Capacity

In the wake of the moral, ethical and human resource capability erosion experienced in the recent past, Indlulamithi participants identified Institutional and Leadership Capacity



A jobless protestor holds a placard during a march in the Ramaphosa squatter settlement, east of Johannesburg

(state, private sector and civil society) as a key determinant for the future of social cohesion. Leadership as expressed in all spheres of South African society will shape the possibilities of social cohesion by 2030. This KDF manifests itself in the strategic capacity of South Africa’s leadership to appreciate the collective interest and work to realise it, the ability to take a long-term view in decision-making, and the kind of ethics and values espoused and practised. In this context working towards a common vision, national unity and fostering a civic spirit in line with our Constitution will be key manifestations of this KDF.

State capacity has been systemically undermined by corruption and poor skills at critical levels. Many *Indlulamithi* participants worried about weaknesses in our public service. The looting of state-owned enterprises was also of particular concern. World

Bank Development Indicators in 2017 suggested that South Africa’s state capacity was worsening. Meanwhile, the country has also been shaken by private sector theft and fraud.

It will be important for the media and civil society to improve its capacity to hold the state and private sector accountable as well as assist in the process of reconciliation. The state’s capacity would make a critical contribution to social cohesion as manifested in the extent to which it is capable of providing economic direction, long-term planning and effective social delivery, expansion of the social security system, improvements to the education, health and criminal justice systems, and the future of governance in state institutions. State capacity’s role in reconciliation and resentment will also be critical. Such capacity will also help South Africa in determining its position in the arena of global relations.