

INDLULAMITHI BAROMETER METHODOLOGY

WHAT IS THE INDLULAMITHI BAROMETER?

The Indlulamithi Barometer accompanies the Indlulamithi Scenarios Project (<https://sascenarios2030.co.za/>) by measuring progress towards social cohesion in South Africa over time towards the 2030 vision set out by the Indlulamithi Scenarios. Three scenarios were identified for 2030:

- Nayi le Walk: a Nation in Step with Itself
- iSbhujwa: An Enclave Bourgeois Nation
- Gwara Gwara: A Floundering False Dawn

The Indlulamithi Barometer was developed by Social Surveys Africa in early 2019 and is updated each year and launched on *Indlulamithi Day* each June until 2030.

WHY A BAROMETER?

The Indlulamithi Scenarios ask “what will it take to achieve social cohesion in South Africa by 2030?”. In answering this question, the Indlulamithi Barometer goes beyond a once-off scenario development and dissemination phase by publishing an annual assessment of trends relating to the scenarios. This enables engagement with policy makers and social change leaders in the country over the long term.

By aggregating many complex data sources into one easily communicated visualization, the annually updated Barometer signals both opportunities and warnings to policy makers. While the Barometer is a monitoring tool which describes retrospective trends based on data from the previous year, it is intended to galvanise future-oriented discussions by policy makers and the general public about how to influence the direction of the country towards the desired scenario.

BAROMETER METHODOLOGY

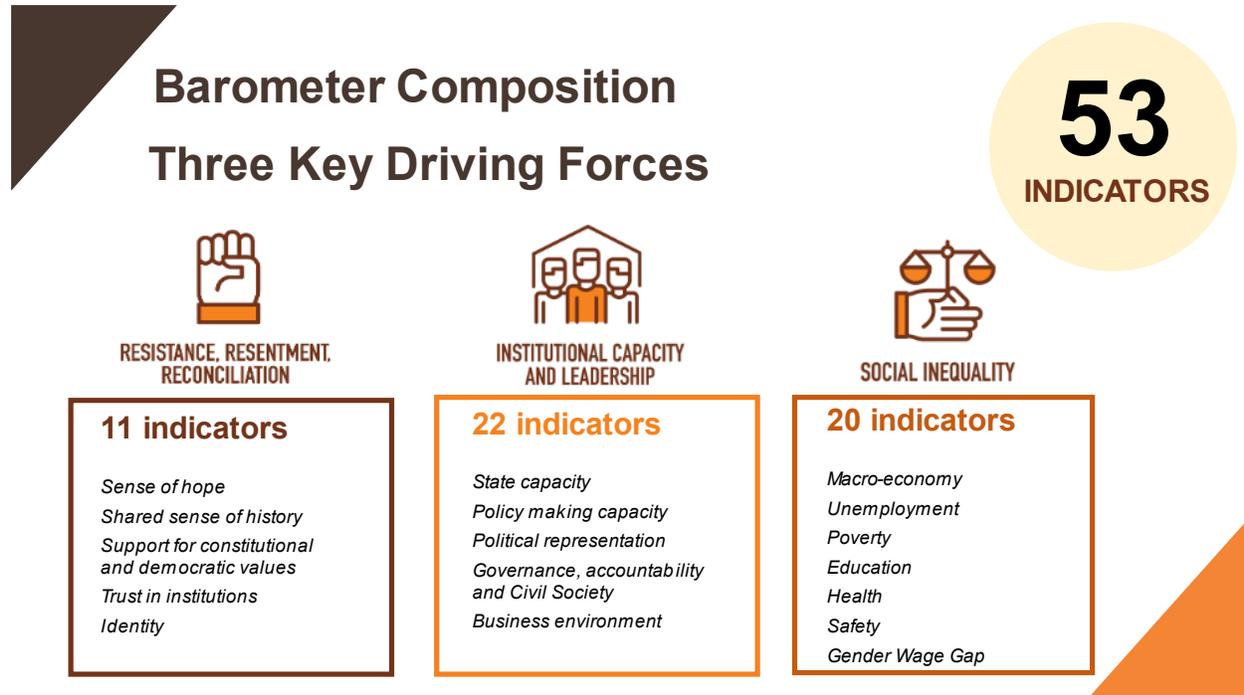
Choice of Indicators

The Indlulamithi Scenarios were developed in 2017 and 2018 (see <https://sascenarios2030.co.za/> for a description of the scenarios methodology) based on research on trends in 25 variables, organized into three Key Driving Forces which influence the direction of the country:

- How people live: Social Inequality
- How people are organised: Institutional Capacity and Leadership
- How people feel: Resistance, Resentment, Reconciliation

For the Barometer, 53 indicators were developed which represent different dimensions of the key driving forces, as per Figure 1.

FIGURE 1: BAROMETER INDICATORS BY KEY DRIVING FORCE



Indicator Data Sources

Each indicator draws on an associated secondary data source, produced and published by a range of reputable national and international sources. Figure 2 lists the data sources.

FIGURE 2: DATA SOURCES FOR BAROMETER QUANTITATIVE MEASURES

1. Statistics South Africa (General Household Survey, Quarterly Labour Force Survey)
2. Auditor General Annual Report
3. Department of Basic Education Annual Report
4. Department of Cooperative Governance and Traditional Affairs Reports
5. Department of Water and Forestry Reports
6. Parliamentary Monitoring Group
7. Afrobarometer South Africa
8. Institute for Justice and Reconciliation South African Reconciliation Barometer
9. HSRC South African Social Attitudes Survey
10. Mo Ibrahim Index of African Governance
11. Freedom House Freedom in the World Report
12. Civicus Monitor
13. Reporters without Borders World Press Freedom Index
14. World Bank Development Indicators
15. Social Progress Index

In addition to 47 quantitative indicators drawing on the above data sources (e.g. GDP growth, % of children with stunting, % of South Africans who agree that South Africans still need reconciliation, etc.), there are 6 qualitative measures which are assessed annually based on media sources (the extent to which higher education is privatized and deregulated, the level of political party factionalism, the extent of electricity supply disruption and the quality of state-owned enterprise management).

Indicator Cut-off Points per Scenario

For each indicator, cut-off points were defined for each scenario and each year, the actual result for that indicator is allocated to one of the scenarios on that basis. As an example, GDP growth under 2% is allocated to Gwara Gwara, between 2-3.5% to iSbhujwa and 3.5% or above to Nayi le Walk. 2018-2019 GDP growth of 0.8% was therefore categorised as falling within the Gwara Gwara Scenario bracket. As the Barometer is repeated annually, each indicator's allocation to one of the scenarios is tested and updated, based on where it falls between cut-off points in that year.

The cut-off points were defined in a range of ways. Indicators that draw on World Development Bank data were defined in relation to the average of global middle-income countries (as defined by the World Bank Development Indicators). For the desired Nayi le Walk scenario, South Africa would want to fall near or above this average. We would remain slightly below it in the iSbhujwa scenario and, and well below it in the Gwara Gwara scenario.

For indicators that draw on the Social Progress Index, a similar comparison logic is used for the average of 15 countries around the world with similar GDPs. Some indicators are compared against the stated goals of the National Development Plan, such as achieving complete eradication of poverty (under the lower poverty line) by 2030 and achieving a halving of unemployment when comparing the 2010 average rate to 2030. Indicator values which are closest to these goals have been allocated to the Nayi le Walk scenario, with progressively higher levels of poverty and unemployment allocated to the other scenarios.

All cut-off points have been matched with targets described in the original scenario narratives, as well as with allied economic modelling completed to test the internal consistency of each scenario's economic predictions.

The qualitative indicators are described for each scenario (see Table 1 below for the cut-off points of all indicators), based on the scenario narratives and discussions with the scenario development team at MISTRA and the Indlulamithi Foundation and are regularly discussed and updated.

Barometer Aggregate Calculation

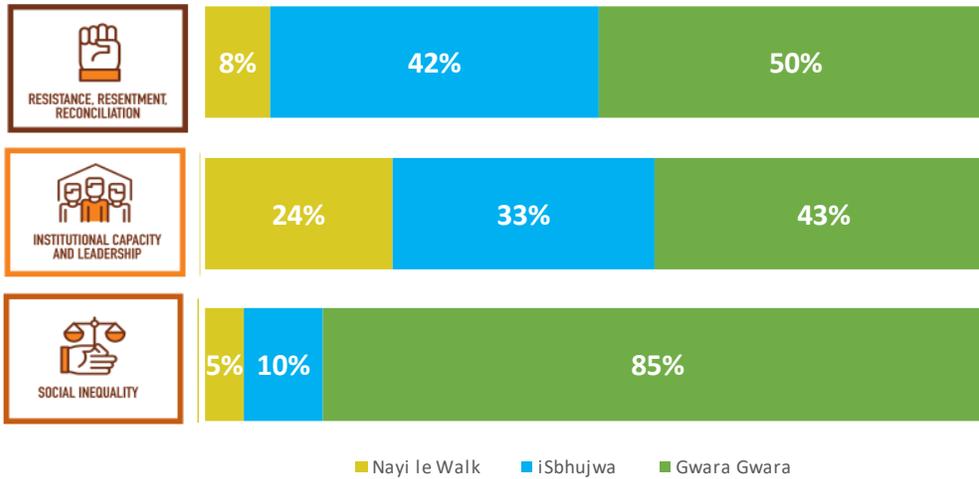
Under each Key Driving Force (KDF), the number of indicators assigned to each scenario are counted, generating a percentage per scenario for each Key Driving Force. For example, in 2021, 5 of the 21 indicators under the Institutional Capacity and Leadership KDF fell into the Nayi le Walk Scenario, with 7 in iSbhujwa and 9 in Gwara Gwara, leading to the 24%, 33%, 43% distribution across scenarios for that KDF. The three KDF distributions (Institutional Capacity & Leadership; Social Inequality; Resistance, Resentment, Reconciliation) are then equally weighted to generate the overall aggregate Barometer distribution.

The Barometer is shown both as a single aggregate and a three-dimensional aggregate (by Key Driving Force) distribution. This is to show that the scenarios do not necessarily have the same distribution across key driving forces. In 2021, the social inequality KDF distribution is notably more skewed toward Gwara Gwara than the other two KDFs.

HARD TRENDS



2021 Barometer by Key Driving Forces



2021 Barometer

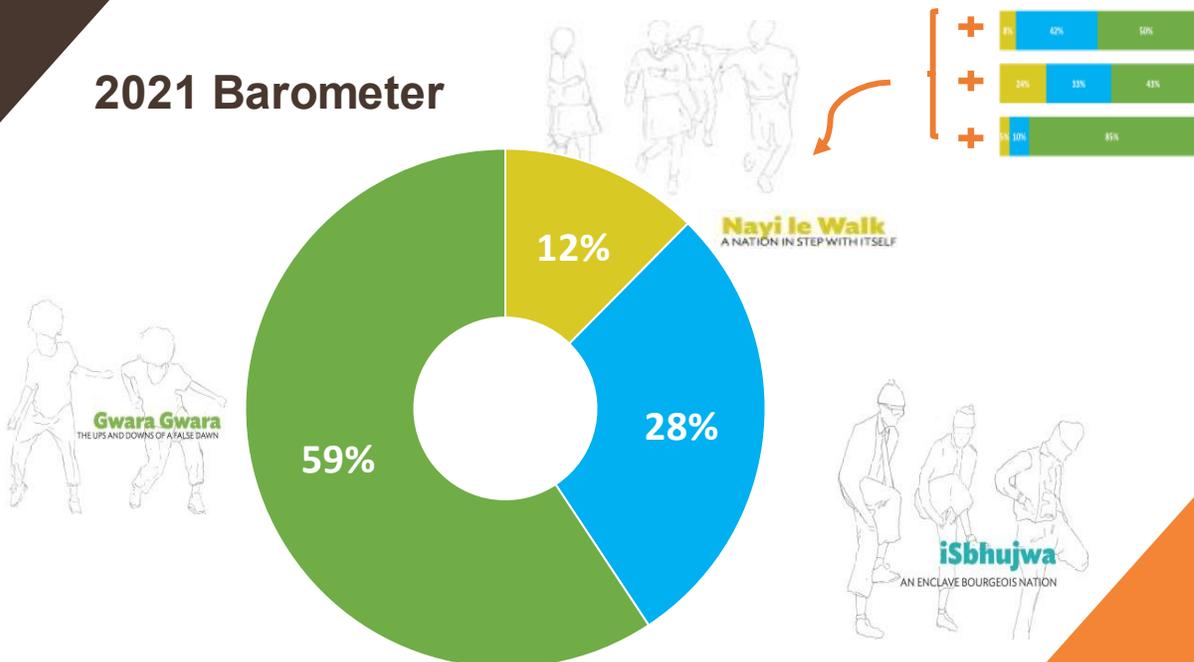


TABLE 1: INDLULAMITHI INDICATORS, SOURCES AND CUT-OFF POINTS BY SCENARIO (2021)

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Institutional Capacity and Leadership (21 Indicators)					
1	State administrative capacity: financial management	PFMA last two years averaged using the Auditor General's "financial health indicator set=good"	over 80% good. Trend stable or improving	70-80% good. Trend stable or slight decrease/increase	under 70% good. Trend decreasing
2	State administrative capacity: financial management	Tax revenue (% of GDP) (compared with Africa average and OECD average).	25-30% (approaching OECD average)	20-25%	under 20% (approaching Africa average)
3	State administrative capacity: municipalities	Auditor General Municipal Financial Audit Report: % municipalities with clean audits	over 50%	20-50%	under 20%
4	State administrative capacity: basic services provision: electricity	Eskom/media: Extent of planned Power Outages	No outages. Increasing mix of public and private alternative power providers	Some outages. Middle classes and businesses increasingly have independent power sources	regular planned outages. Middle classes and businesses increasingly have independent power sources
5	State administrative capacity: basic services provision: water	DWAF water supply reliability measure	80% and above	70-80%	below 70%

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Institutional Capacity and Leadership (21 Indicators)					
6	State-owned Enterprises	media: ownership and profitability results	Function efficiently and profitably (possibly as PPPs) without drawing on the fiscus	partially privatised	resistance to privatisation so continue to bleed public fiscus
7	Policy Process: Climate Change	Climate Action Tracker	Commitments and actions which are compatible with Paris Agreement levels of global warming	Commitments and actions which are compatible with 2-3 degrees warming	Commitments and actions which are high insufficient and critically insufficient (4+ degrees warming)
8	Policy process: Land Reform	media: Progress on Land Reform policy and implementation	Policy process followed, consultative processes taken seriously, substantive land allocation by rational means, recipients supported	Policy process followed, consultative processes mostly for show, partial land allocation by rational means, recipients not supported	Policy process only partly followed, consultative processes used for populist mobilisation, partial land allocation for patronage, recipients not supported
9	Policy process: Health	media: Progress on NHI policy and implementation	NHI policy debated with consensus approach and clear financing plans, and then implemented successfully with sustainable financing	NHI policy process debated with conflict and without clear plans for sustainable financing, and is implemented without full buy-in and inclusion of all stakeholders	NHI policy process is stalled because of major conflicts. When implemented, mismanagement depletes public health budgets, service quality is reduced and health care access is reduced.

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Institutional Capacity and Leadership (21 Indicators)					
10	National Gender Balance in Parliament	WDI % Women in Parliament	at least 50%	40-50%	less than 40%
11	National Youth Representation in Parliament	Parliamentary Monitoring Group % of MPs 35 or younger, compared with https://www.ipu.org/our-work/youth/data-youth-participation	over midway point of global averages for MPs under 30 (2%) and under 40 (14%) (2016) = 6%	around midway point of global averages for MPs under 30 (2%) and under 40 (14%) (2016) = 6%	under midway point of global averages for MPs under 30 (2%) and under 40 (14%) (2016) = 6%
12	Political Parties	media and elections results: constellation of parties in power	ANC retains power or there is a clear and well managed transition to a new strong ruling party	governing coalitions and splits within the major parties	ANC discredited. All parties fragment. Opposition coalition from 2024 which regularly factions and splits. No political stability
13	Governance Quality	Mo Ibrahim Foundation Governance Index	in top 10 countries in Africa, stable or positive trend	below top 10 countries in Africa, gradual declining or annual up and down trend	below top 10 countries in Africa, fast decline over several years
14	Media freedom (laws and treatment of journalists)	Reporters without Borders World Press Freedom Index	media freedom protected and investigative journalists active and not constrained	investigative journalists not protected by the state from 'privatised' threats	media freedom curtailed and investigative journalists harassed or jailed
15	Civil society strength	Civicus Monitor	Open	narrowed	obstructed

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Institutional Capacity and Leadership (21 Indicators)					
16	Political rights and civil liberties	Freedom House Freedom in the World Report	Free	Partly free	Not free
17	Climate Change	Greenhouse gas emissions (CO2 equivalents per GDP) Trend (SPI, compared with middle-income peer countries)	overperforming compared with SPI peer countries	performing within expected range for SPI peer countries	underperforming compared with SPI peer countries
18	Institutional Environment for Small Business	WDI: Number of Days to start a business, compared to upper middle income average (26 in 2018)	under upper middle income average	around upper middle income average	above upper middle income average
19	Economic Sectors: Mining	StatsSA sector economic growth	stable	Stable but loses jobs	investment reduced. Failure to make most of commodities demand boom due to policy uncertainty. Spread in illegal mining
20	Economic Sectors: Agriculture	StatsSA sector economic growth	high growth through improving agri linkages and agro-processing	low growth	investment reduced/stagnation
21	Economic Innovation and Adaptation	WDI: Research & Development Expenditure as % of GDP, compared to Upper Middle Income Countries (2016, 1.66%)	above upper middle income average	around upper middle income average	under upper middle income average

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Social Inequality (19 Indicators)					
1	GDP Growth	StatsSA GDP Growth 2020 financial year	above 3.5%	2-3.5%	below 2%
2	Gini coefficient (national)	WDI (2015) compared to NDP 2030 goal of 0.6 (from baseline of 0.69 in 2009)	reached NDP goal of 0.6 or strong downward trend	vacillating between 0.61 and 0.65	above 0.65 or strong upward trend
3	Poverty: % population under the poverty line	No new data produced by StatsSA since 2016. CRAM NIDS data for 2020	under 5%	6-20%	over 20%
4	Poverty reduction trend (direction of poverty reduction aggregate in past 5 years)	CRAM NIDS data on increase in poverty in 2020	poverty reducing	poverty remaining stable	poverty increasing
5	Nutrition/Poverty: % HH food access severely inadequate	No new data produced by StatsSA since 2017. CRAM NIDS show 17-18% household food insecurity in late 2020 and early 2021. IPC 16% acute food insecurity Jan 2021	<5%	5-10%	over 10%
6	Health: Life expectancy at birth (total years)	StatsSA Midyear Population Estimate	increasing for all groups by 5 years (from 2017 base of 63)	increasing for upper/middle class, decreasing for poor. Overall slight decrease from 2017 base of 63	decreasing trend from 2017 base of 63
	Indicators	2021 Data Sources	Scenario Cut-Off Points		

KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Social Inequality (19 Indicators)					
7	Health: Maternal mortality rate (deaths/100,000 live births)	Social Progress Index	better than 15 reference countries with similar GPD (as calculated by SPI national scorecard)	average for 15 reference countries with similar GDP	worse than 15 reference countries with similar GDP
8	Health: Under-5 mortality rate	Social Progress Index	better than 15 reference countries with similar GPD (as calculated by SPI national scorecard)	average for 15 reference countries with similar GDP	worse than 15 reference countries with similar GDP
9	Health: Child Stunting (% of children)	Social Progress Index	better than 15 reference countries with similar GPD (as calculated by SPI national scorecard)	average for 15 reference countries with similar GDP	worse than 15 reference countries with similar GDP
10	Employment: Share of youth NEET (not in education, employment or training)	StatsSA QLFS Q4 (2020). Share of youth not in education, employment or training, total (% of youth population)	Under 20% and with a downward trend towards OECD average (16%)	between 20-30%	Over 30% and with a stable or upward trend
11	Employment: Young Youth (15-24) unemployed	StatsSA QLF Q4 (2020) % youth (15-24) unemployed	similar to general unemployment rate	half again the general employment rate	around double the general unemployment rate
12	Employment: unemployed with advanced education	StatsSA QLF Q4 (2020) compared with WDI upper middle income average (2019 data: 13.58%)	under upper middle income average	around upper middle income average	above upper middle income average

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Social Inequality (19 Indicators)					
13	Employment: Unemployment, total	StatsSA QLF Q4 (2020) compared with WDI upper middle income average (2018 data 7.8%)	around upper middle income average/NDP target	between average and twice the upper middle income average	more than twice the upper middle income average
14	Employment: unemployment race gap	StatsSA QLF Q4 (2020)	less than 10% difference	10-20% difference	more than 20% difference
15	Education: ECD: inequality of group learning access for 4-5 year olds	CRAM NIDS data on ECD access under Covid	Children from low- income hh have equal access to quality ECD with children from well- off households	Children in poor households are somewhat less likely to attend quality ECD than children in well-off households	Children in poor households are much less likely to attend quality ECD than children in well- off households
16	Education: grade 12 completion rate (out of cohort starting Grade 1)	Department of Basic Education reports compared with UNESCO global data on secondary completion rates	above average of upper middle income countries (59% in 2017)	around average of upper middle income countries (59% in 2017)	under average of upper middle income countries (59% in 2017)

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Social Inequality (19 Indicators)					
17	Education: tertiary	Qualitative assessment based on media reports	public TVETs improve in quality and no-fee tertiary education expands access to higher education. University quality remains high as student numbers are increasingly balanced across universities and TVETs	higher education increasingly privatised. Wide range of quality in TVET and private universities without good quality controls. Many young people graduate without prospects of their degrees being recognised in the world of work	free higher education puts pressure on fiscus. As numbers increase without sufficient university capacity, quality falls
18	Safety: annual murder rate (deaths per 100,000)	SA Crime Statistics for 2019/2020 (SAPS)	around upper middle income average	between average and twice the upper middle income average	more than twice the upper middle income average
19	Safety: Traffic deaths	Social Progress Index: deaths out of 100,000	better than 15 reference countries with similar GDP (as calculated by SPI national scorecard)	average for 15 reference countries with similar GDP	worse than 15 reference countries with similar GDP
20 (new indicator in 2020)	Gender wage gap (median hourly wage)	ILO Global Wage Data	in bottom 5 of upper middle income countries	average for upper middle income countries	in top 5 of upper middle income countries

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Resistance, resentment, reconciliation (11 Indicators)					
1	Media freedom (public support for)	SASAS: The government should be in control of what information is given to the public (disagree + Strongly disagree)	majority of public disagree with government control of information	public split evenly between media freedom and control	majority public support government control over media
2	Sense of hope/belief in country's trajectory	Ipsos: The political party landscape in South Africa amidst Covid-19 (Nov 2020)	>55% right direction	public split evenly between right and wrong direction	<55% right direction
3,1	Trust/belief in Courts	SASAS: Q9 % who strongly trust and trust the courts	>60% agree	40-60% agree	<40% agree
3,2 (not included in 2021)	Trust/belief in Courts	Afrobarometer	>60% often or always	40-60% often or always	<40% often or always
4	Perceived Freedom of speech	SASAS: The government should have the authority to prevent citizens from criticising it (disagree + Strongly disagree)	majority of public disagree with government control of speech	public split evenly between freedom of speech and control	majority public support government control over speech

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KDF	Indicator	2021 Source: definition	Nayi le Walk	iSbhujwa	Gwara Gwara
Resistance, resentment, reconciliation (11 Indicators)					
5 (not included in 2021)	Perceived Freedom of civil society association and holding govt to account	Afrobarometer: more or less freedom now compared to a few years ago: The freedom of independent groups or non-governmental organisations to speak, hold meetings, or advocate their views freely, including criticizing the government if they choose?	more or same freedom	divided responses	less freedom
6	Sense of hope/belief in country's economic trajectory	Ipsos: optimism about 2020 for you personally (Feb 2021)	>50% better	middle class better, working class and poor worse	<50% better
7	Perceived corruption trend	SASAS: Q33 satisfaction with how government dealt with corruption in neighbourhood	<40% dissatisfied	40-60% dissatisfied	>60% dissatisfied
8	National vs ethnic identity	SASAS: Q52-53 Ethnic identity more important than national identity	national identity more important than racial/ethnic identity	similar importance of national and racial/ethnic identity	racial/ethnic identity more important than national identity

	Indicators	2021 Data Sources	Scenario Cut-Off Points		
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Resistance, resentment, reconciliation (11 Indicators)					
9 (not included in 2021)	Perceptions about reconciliation	South African Reconciliation Barometer: Agreement with "South Africans still need reconciliation"	Widespread feeling that reconciliation is occurring/has occurred	Increasing demand that more serious attention to reconciliation is required	widespread feeling that reconciliation is not possible
10 (not included in 2021)	Shared sense of history: TRC	South African Reconciliation Barometer: Agree that TRC provided good foundation for reconciliation	largely shared recognition of TRC across population groups	divided recognition of TRC across population groups	widespread feeling that TRC was not useful
11	Shared sense of history and future: land redistribution	SASAS: Q87 Government should redistribute land	shared understanding of need for land reform across population and income groups	divided on need for land reform by population/income groups by less than 20%	divided on need for land reform by population/income groups by more than 20%
12 (new indicator in 2021)	Belief in democratic dispensation	SASAS: Q35 Democracy is preferable to other forms of government	democracy preferred by majority	even split between democracy, non-democracy and apathy	non-democracy or apathy by majority
13 (new indicator in 2021)	Trust national government	SASAS: Q8 Trust in National Government (compared with OECD average 45% in 2019)	>45% trust	31-44% trust	<30% trust
14 (new indicator in 2021)	Sense of Trust in institutions to do what is right	Edelman Trust Barometer 2021: Trust Index is the average percent trust in NGOs, business, government and media	Trust	Neutral	No Trust
15 (new indicator in 2021)	Trust in government as COVID-19 Information source	CRAM NIDS Wave 1 survey (May-June 2020), compared to 10 developed countries (Edelman Trust Survey Covid 2020)	>40% (developed country average is 40% in early 2020)	25-40%	<25%