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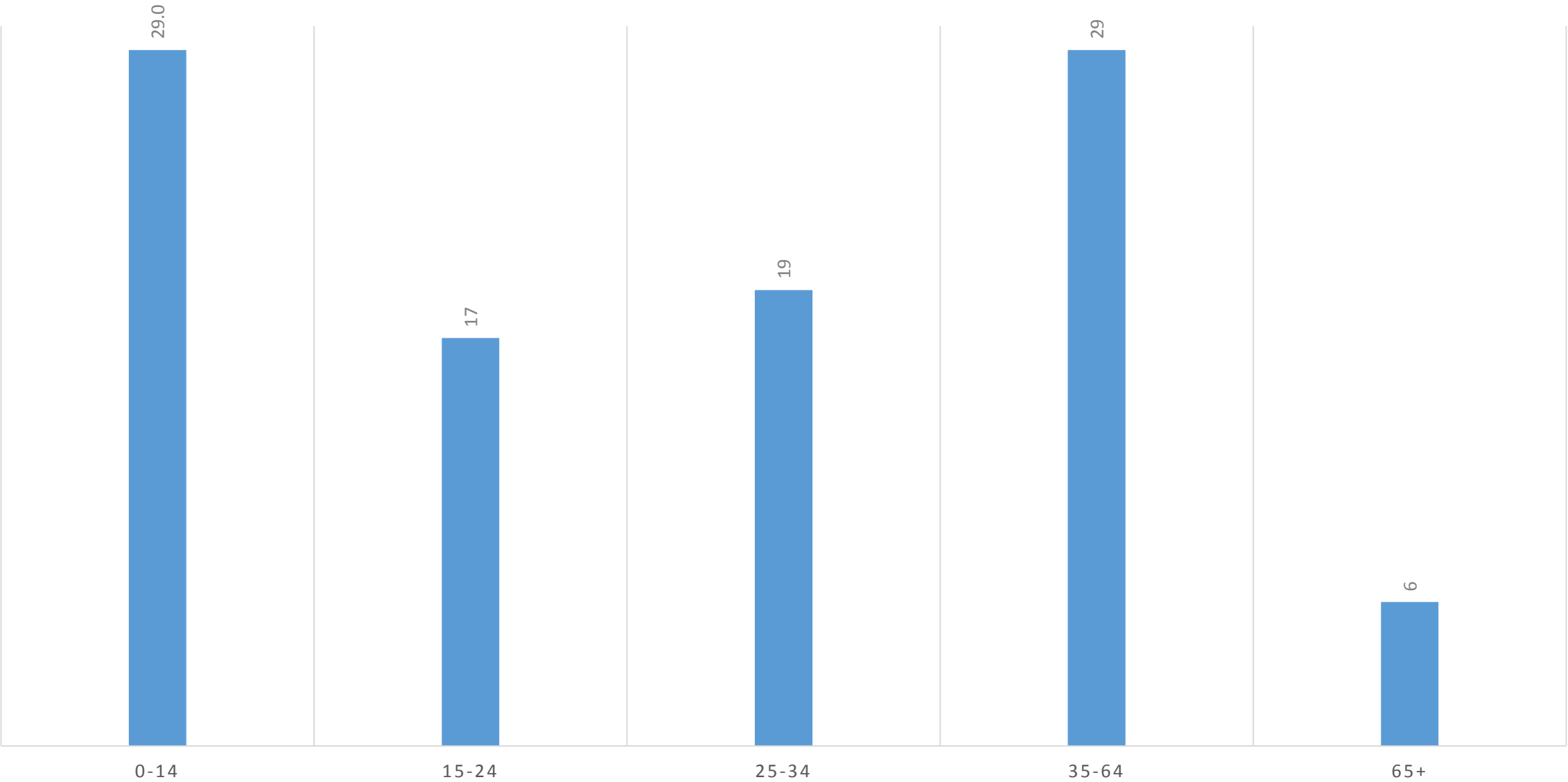
The rise or fall of South Africa in the 2020s

The latest scenarios

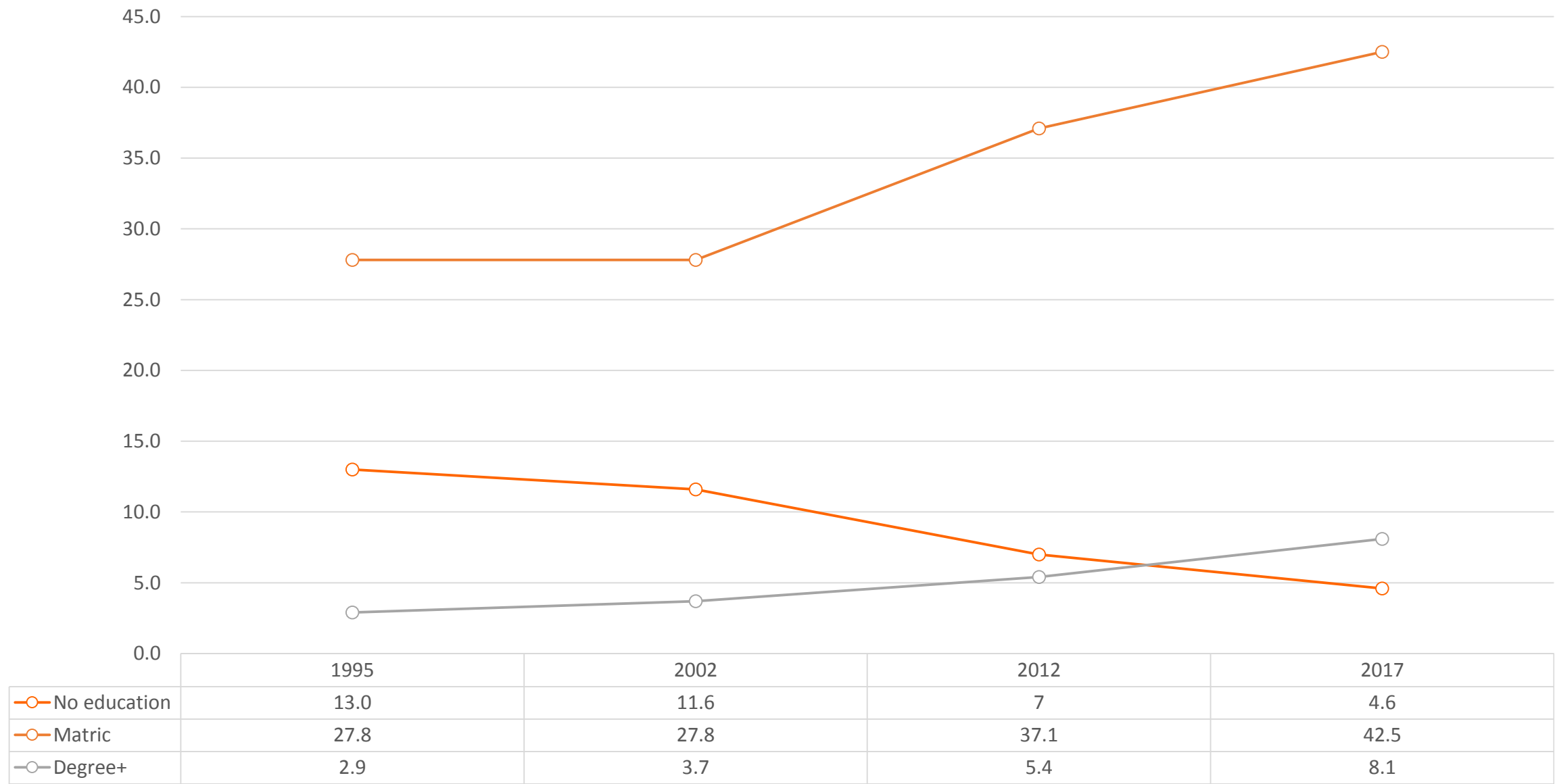
A strategic intelligence briefing

Frans Cronje – 2019

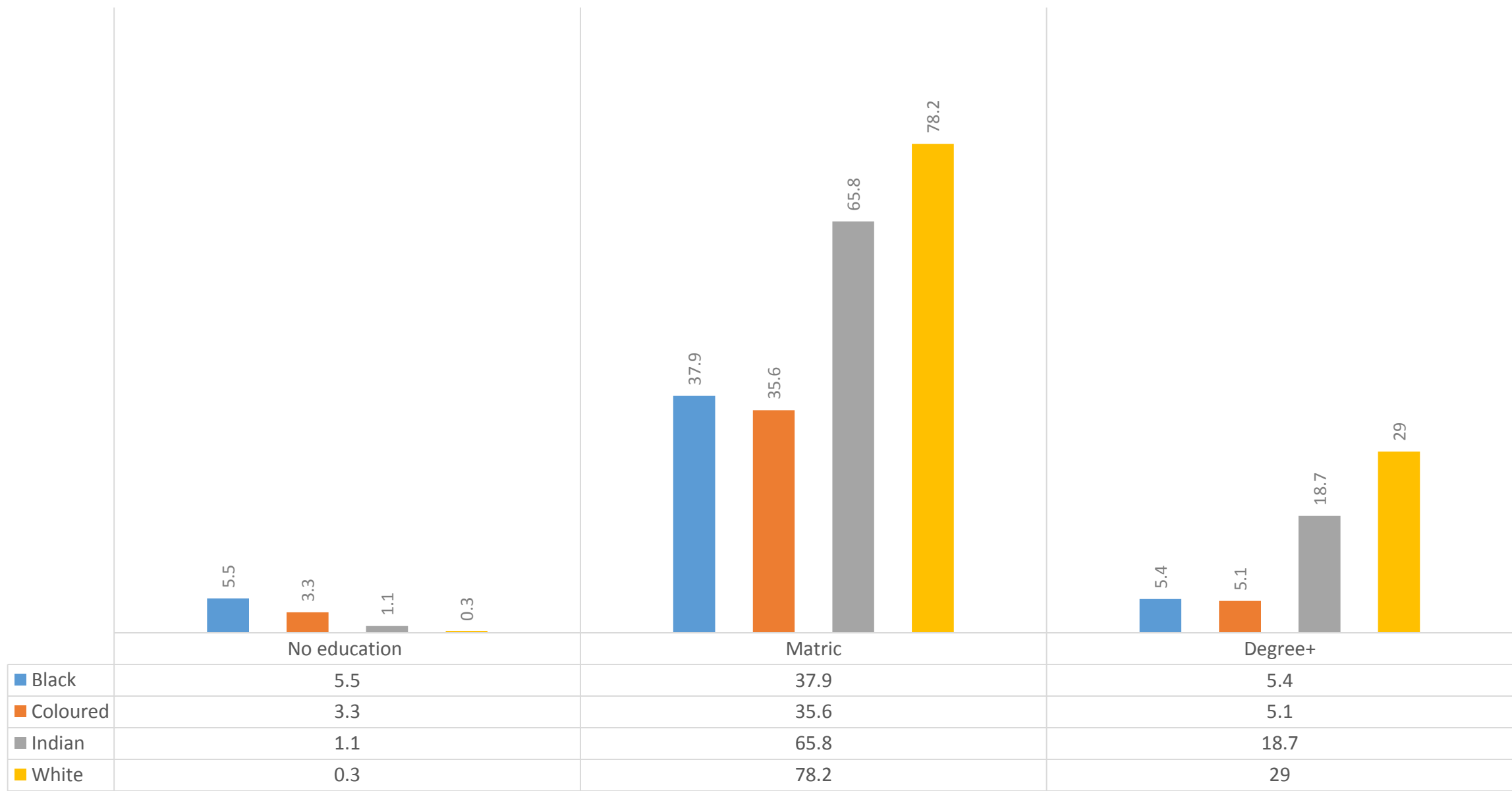
Age breakdown of the population



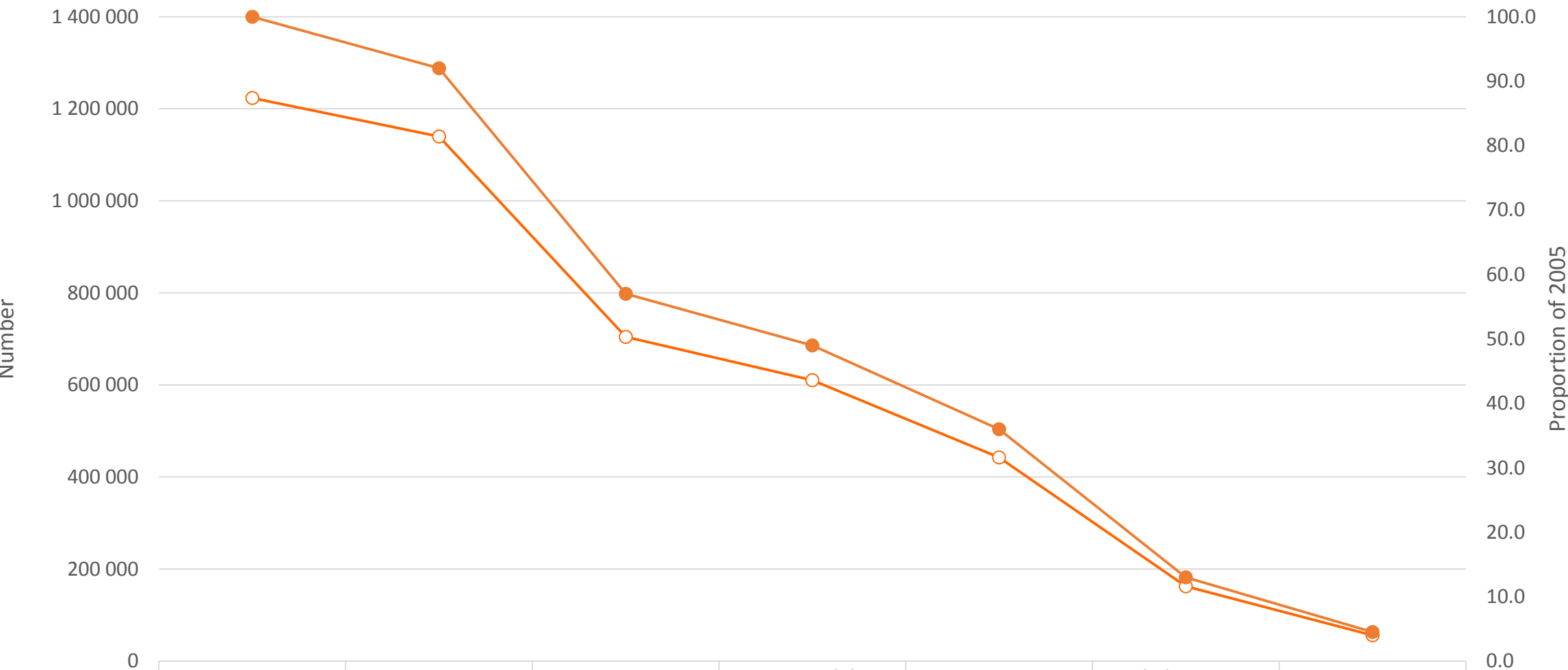
Education profile of people aged 20+ over time



Education profile of people aged 20+ by race

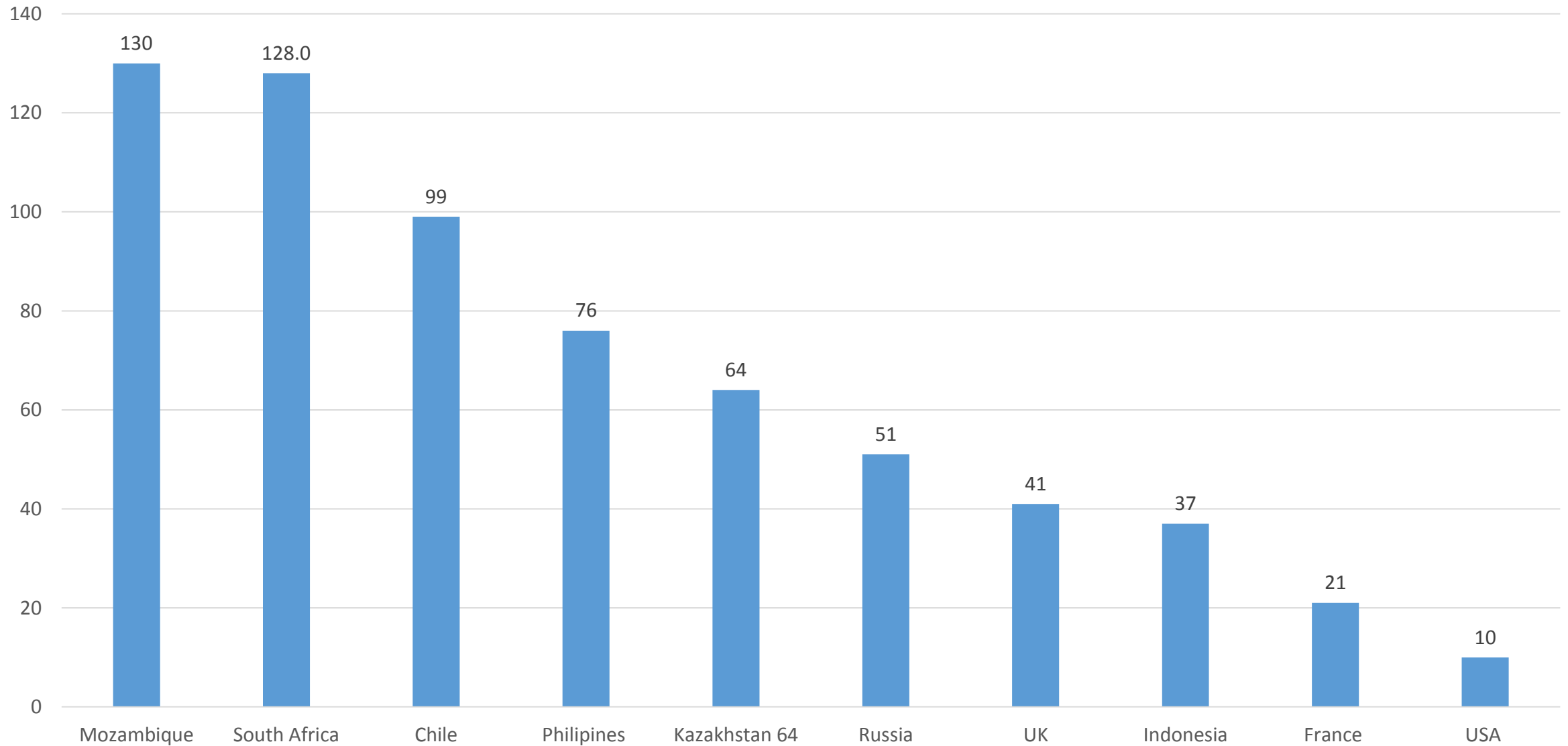


High school throughput

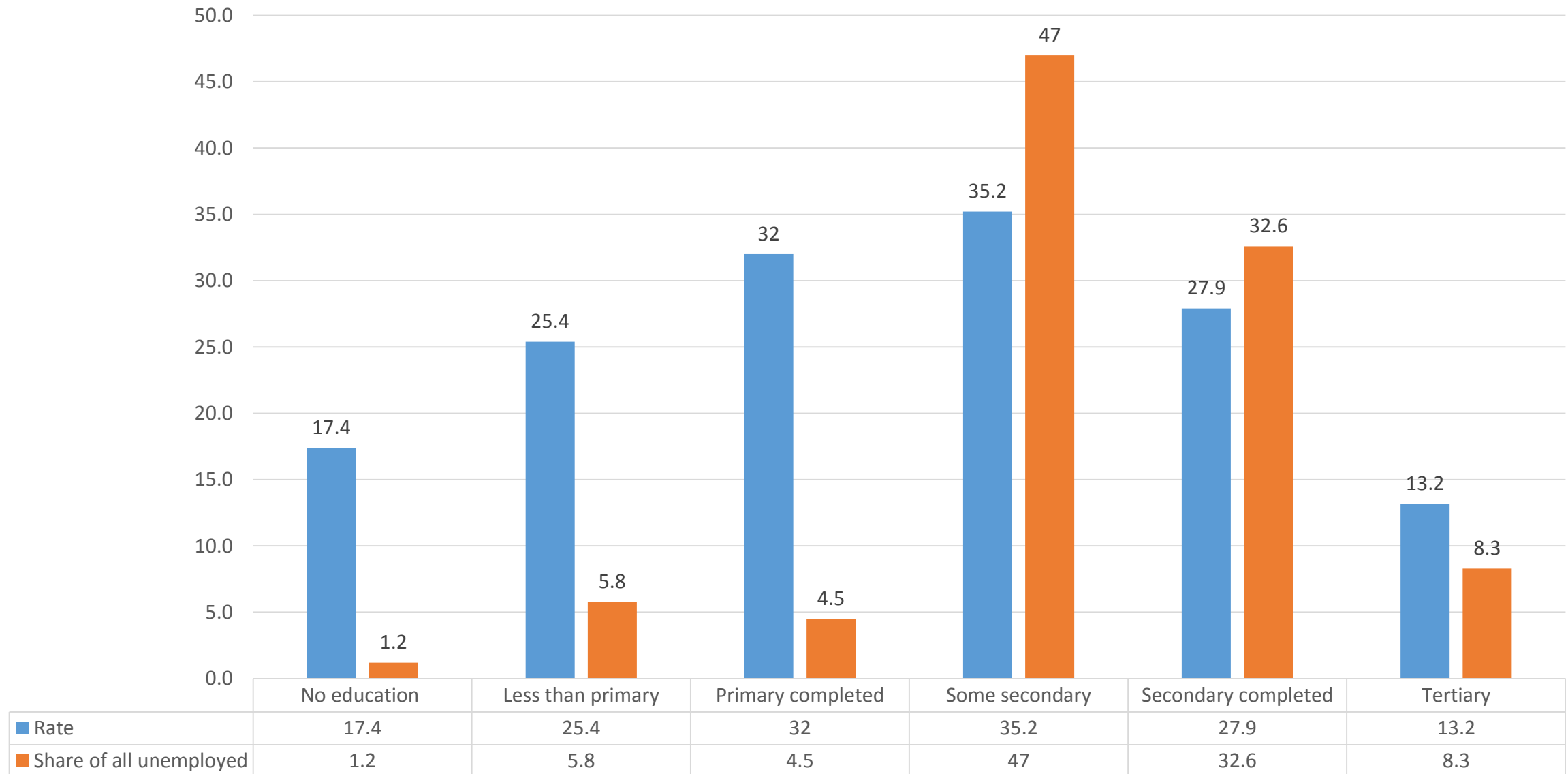


	Grade-1 2005	Grade -10 2014	Matric-2016	Matric candidates 2016	Matric passes 2016	Bachelors passes 2016	Maths pass 50%+
○ Number	1223581.0	1139872	704533	610178	442672	162374	55820
● Percentage	100.0	92	57	49	36	13	4.5

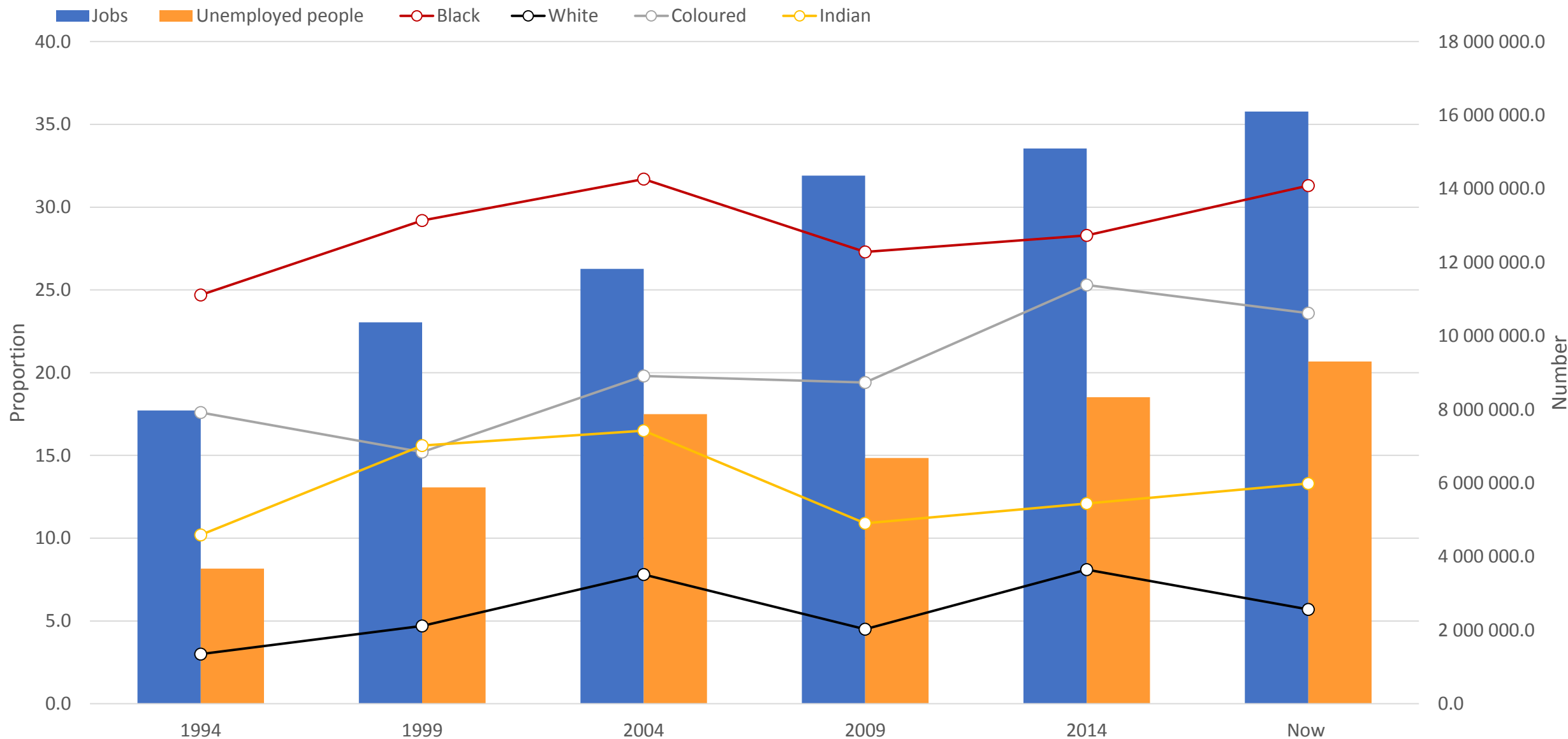
Quality of maths and science education ranked out of 140 countries



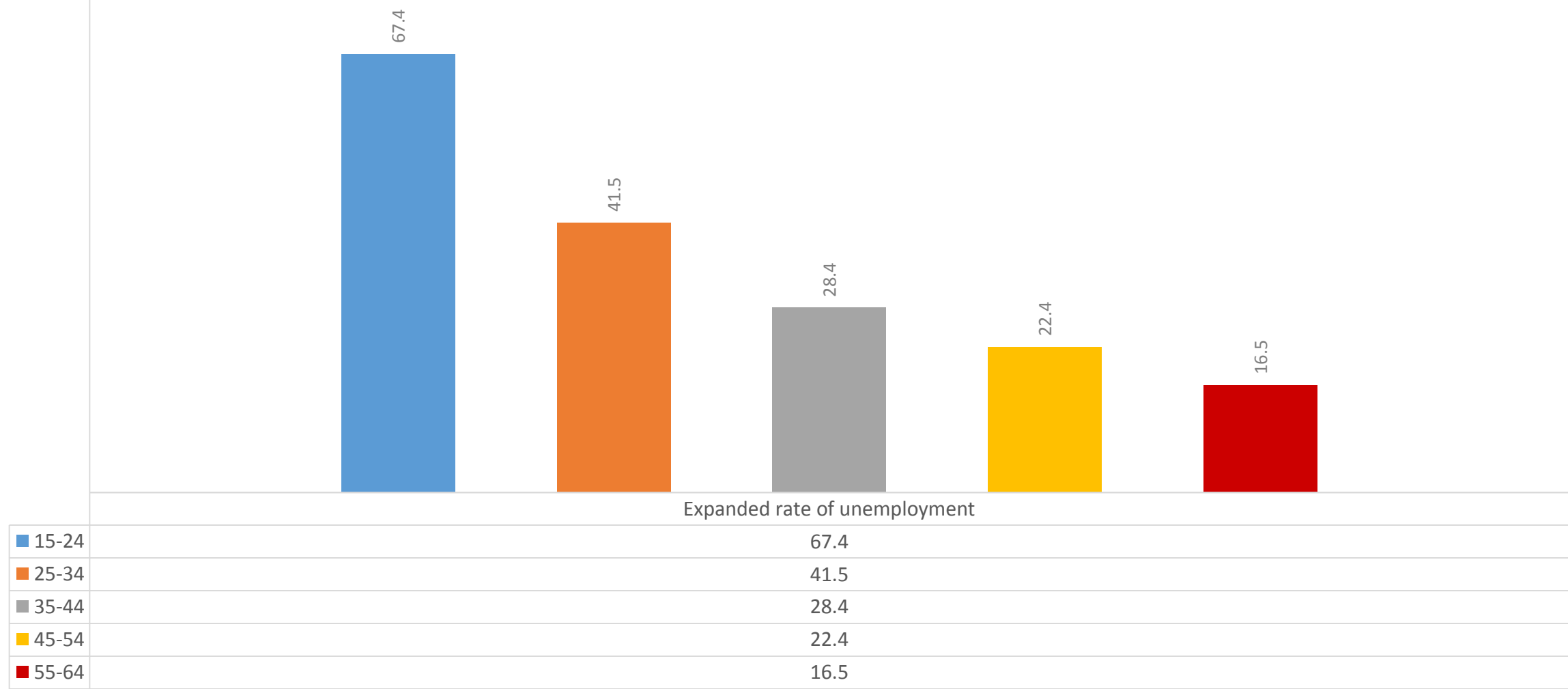
Unemployment (official) by level of education



Unemployment rates (official) by race vs total job numbers and total unemployed

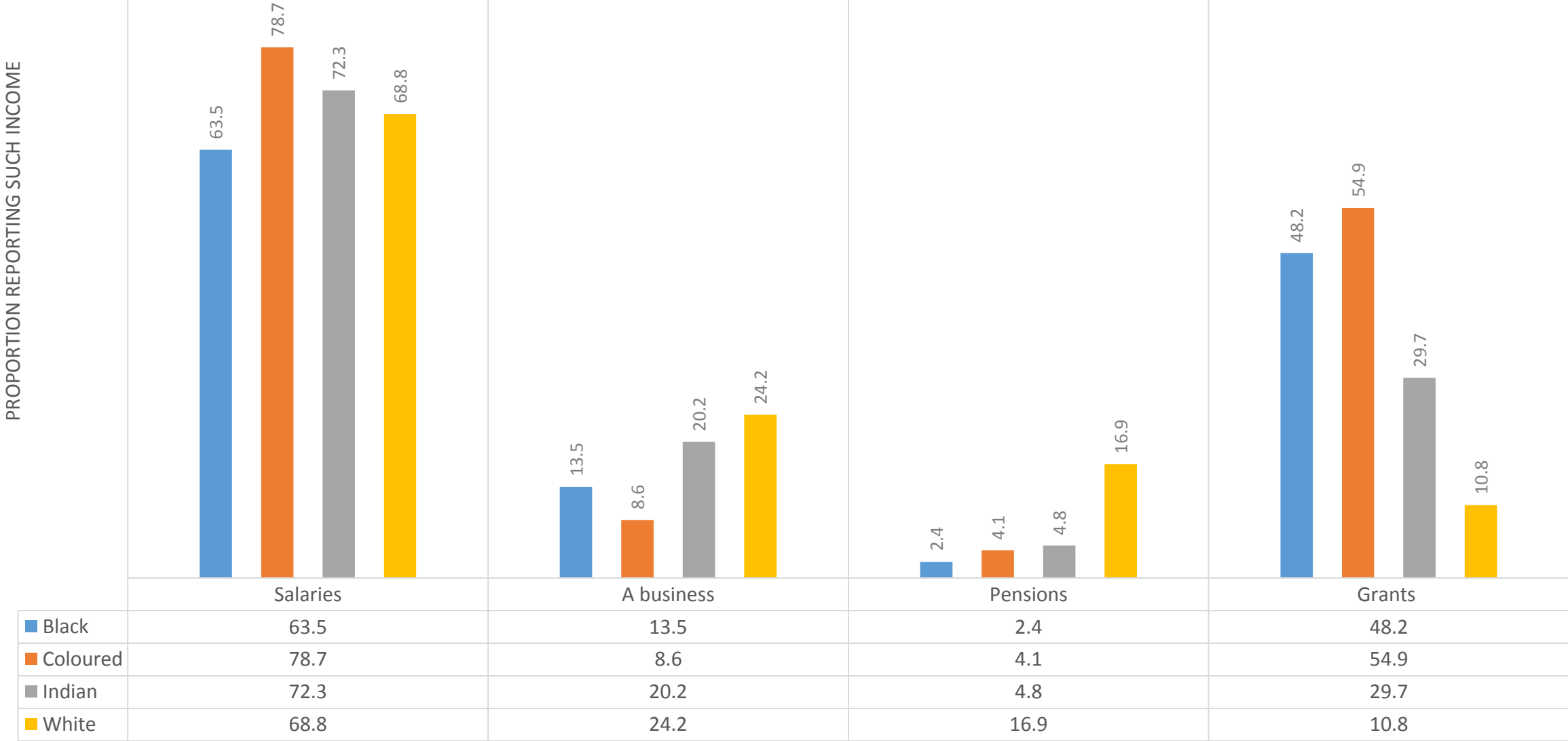


Unemployment (expanded) by age

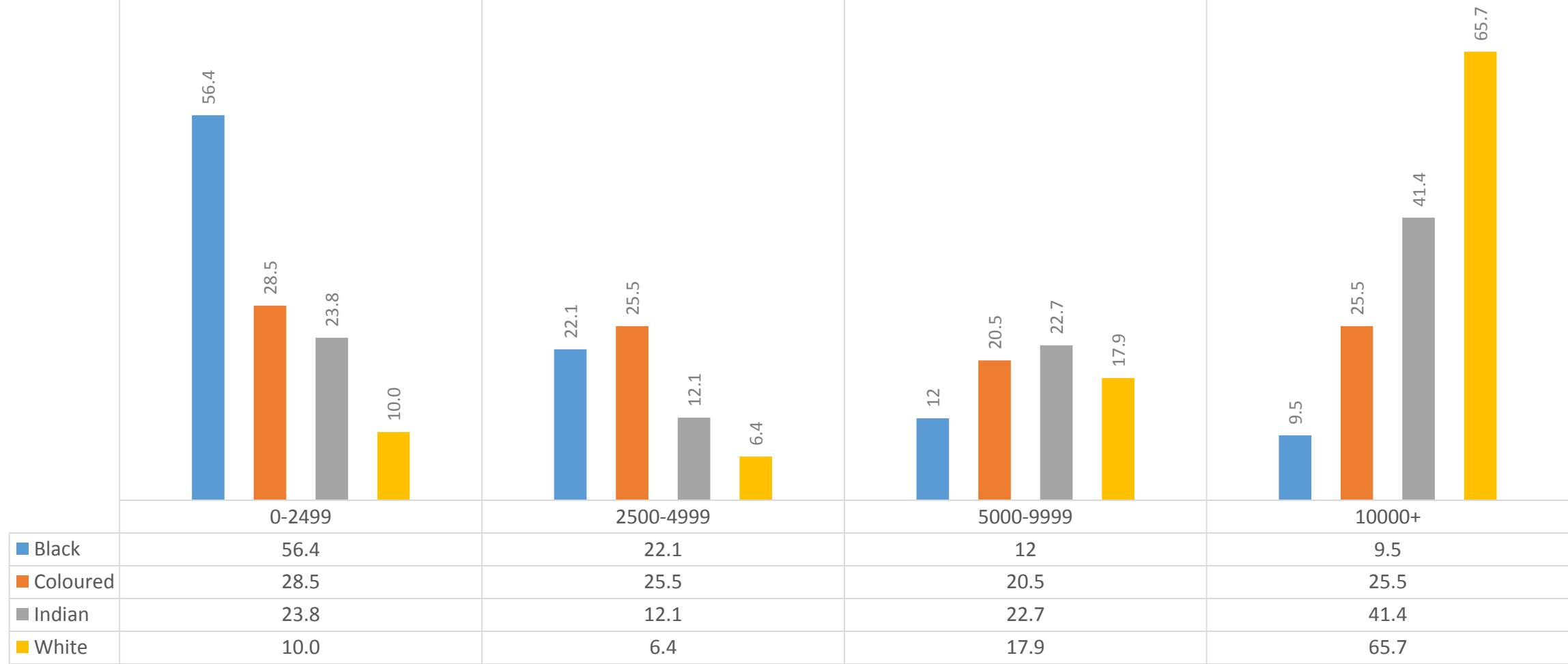


Household income sources

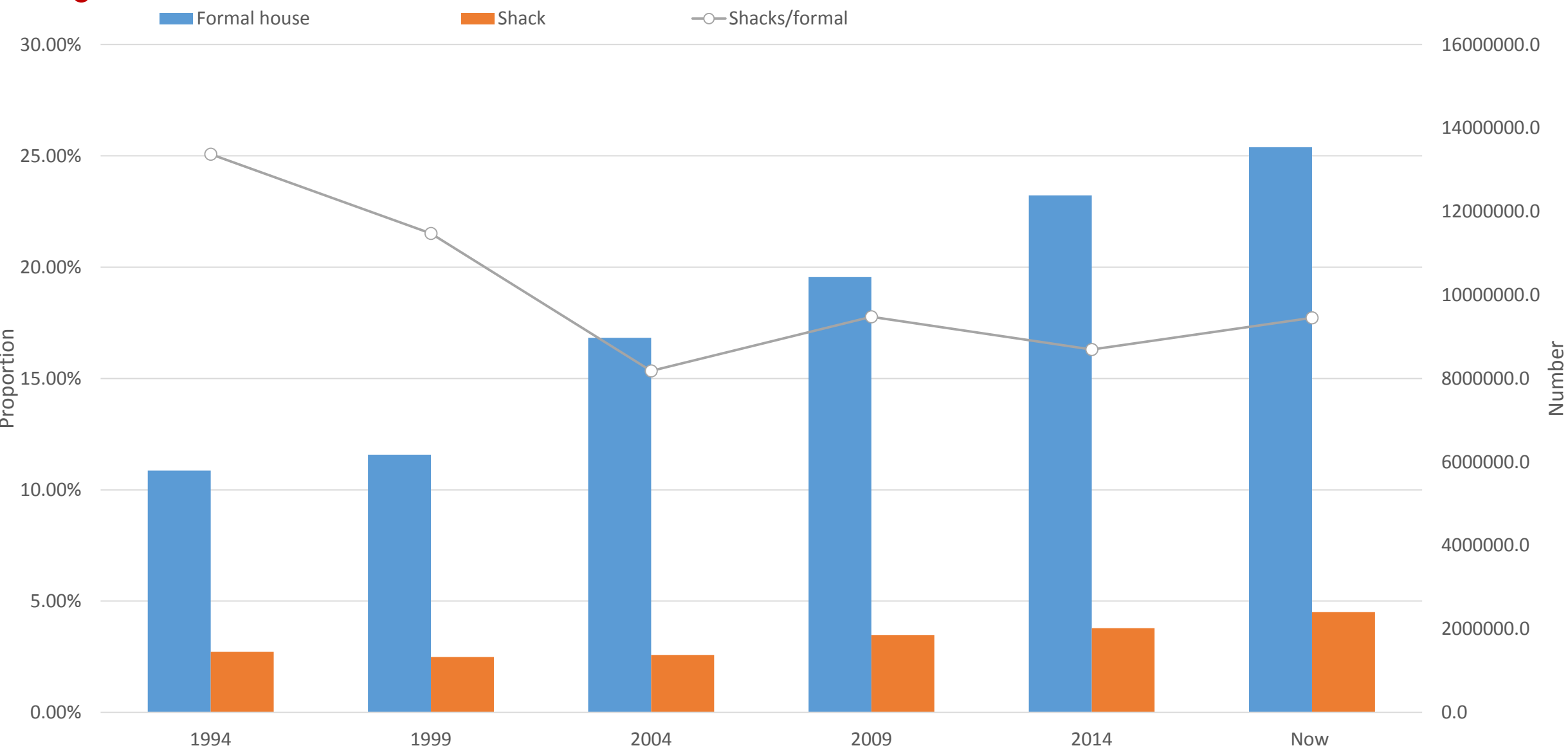
PROPORTION REPORTING SUCH INCOME



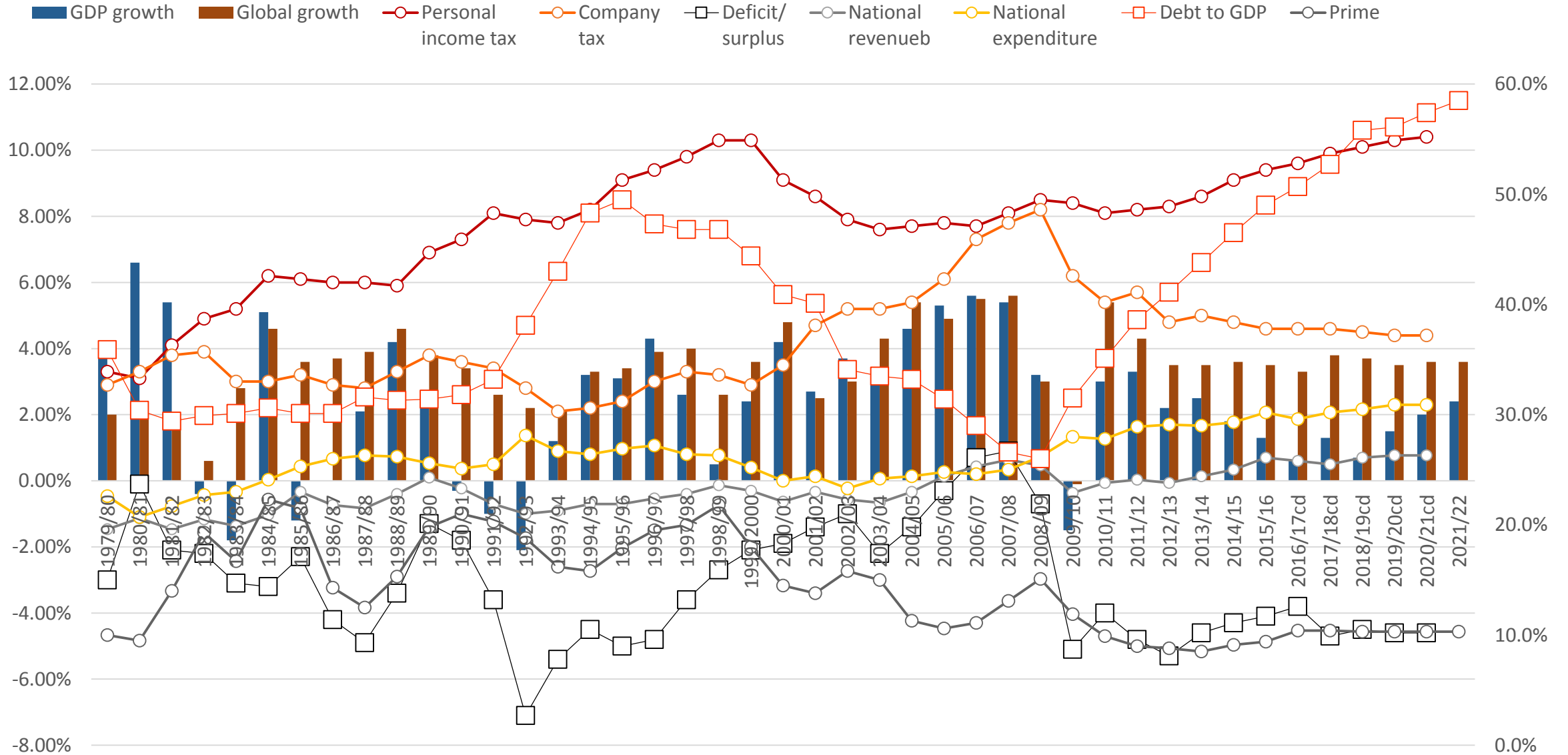
Household expenditure categories by race



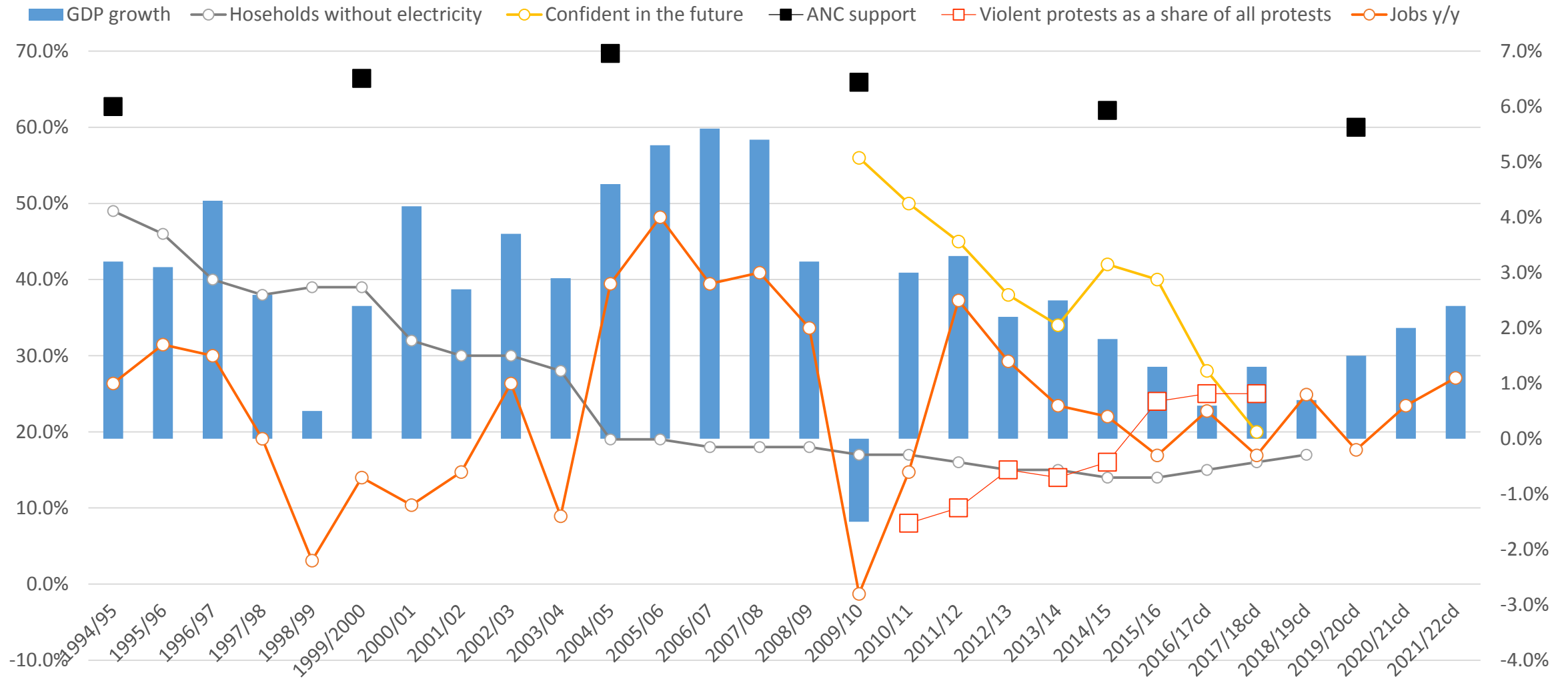
Living conditions



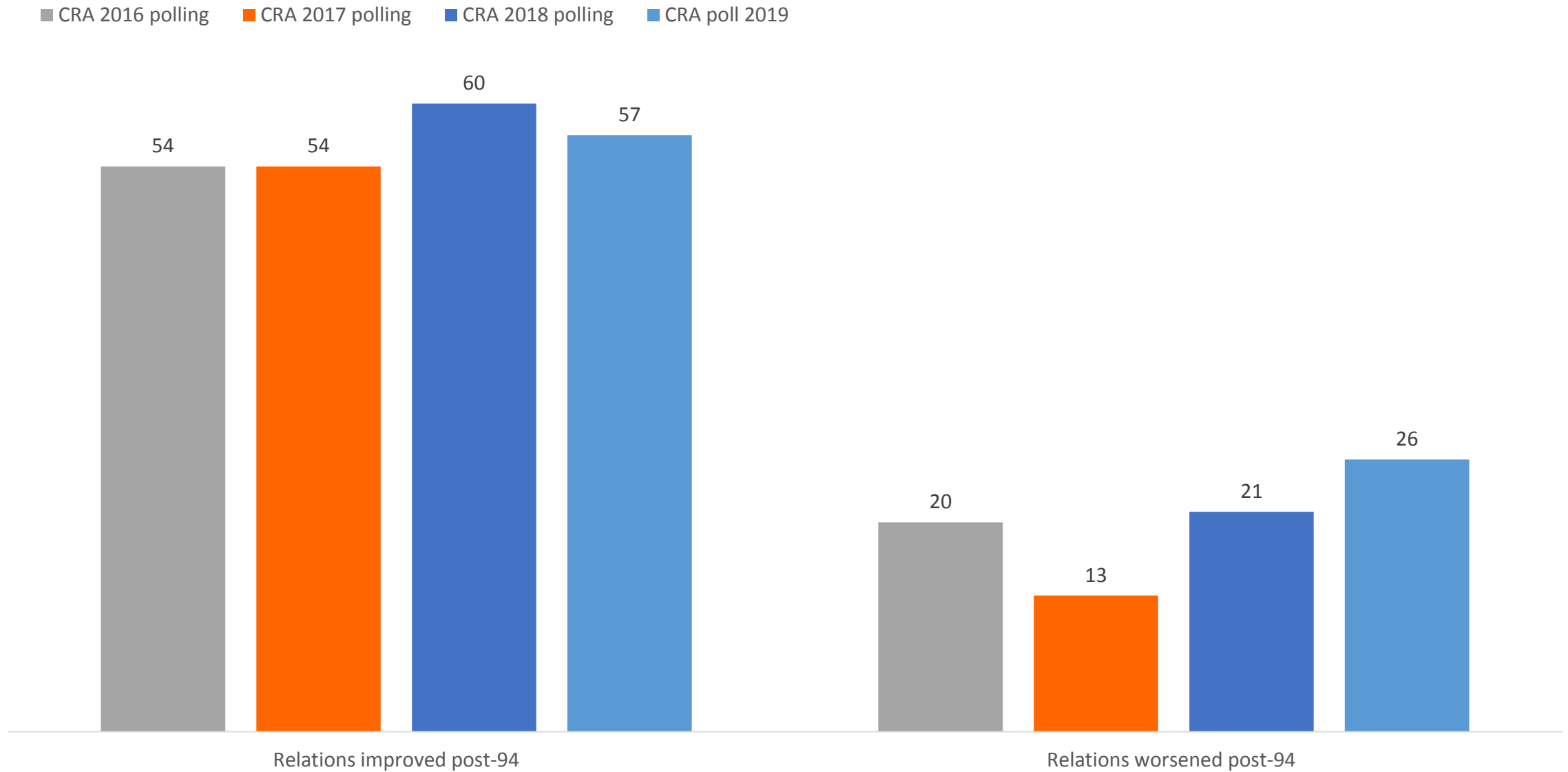
The economy 1978 to 2021



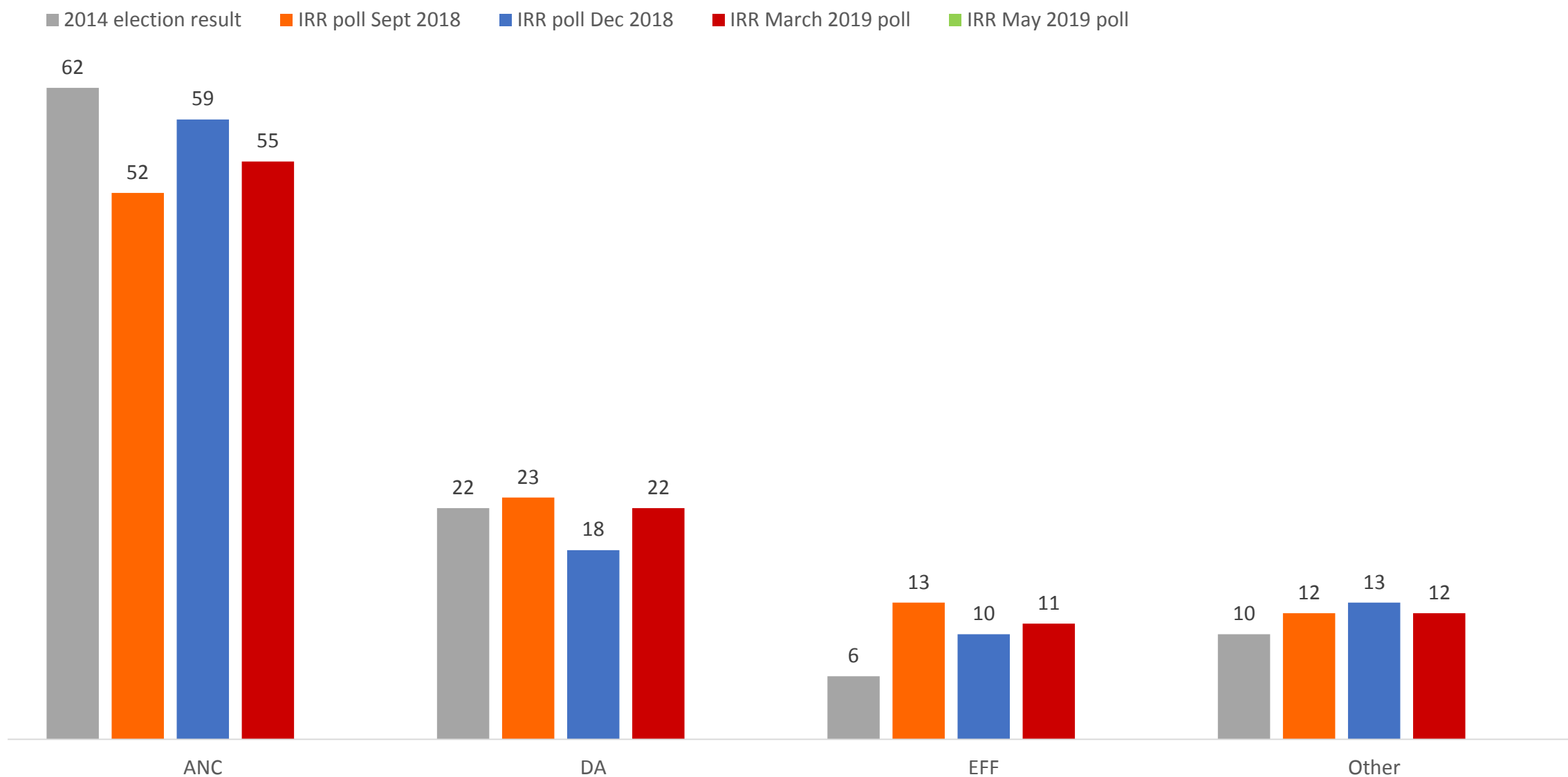
Key relationships 1994-now



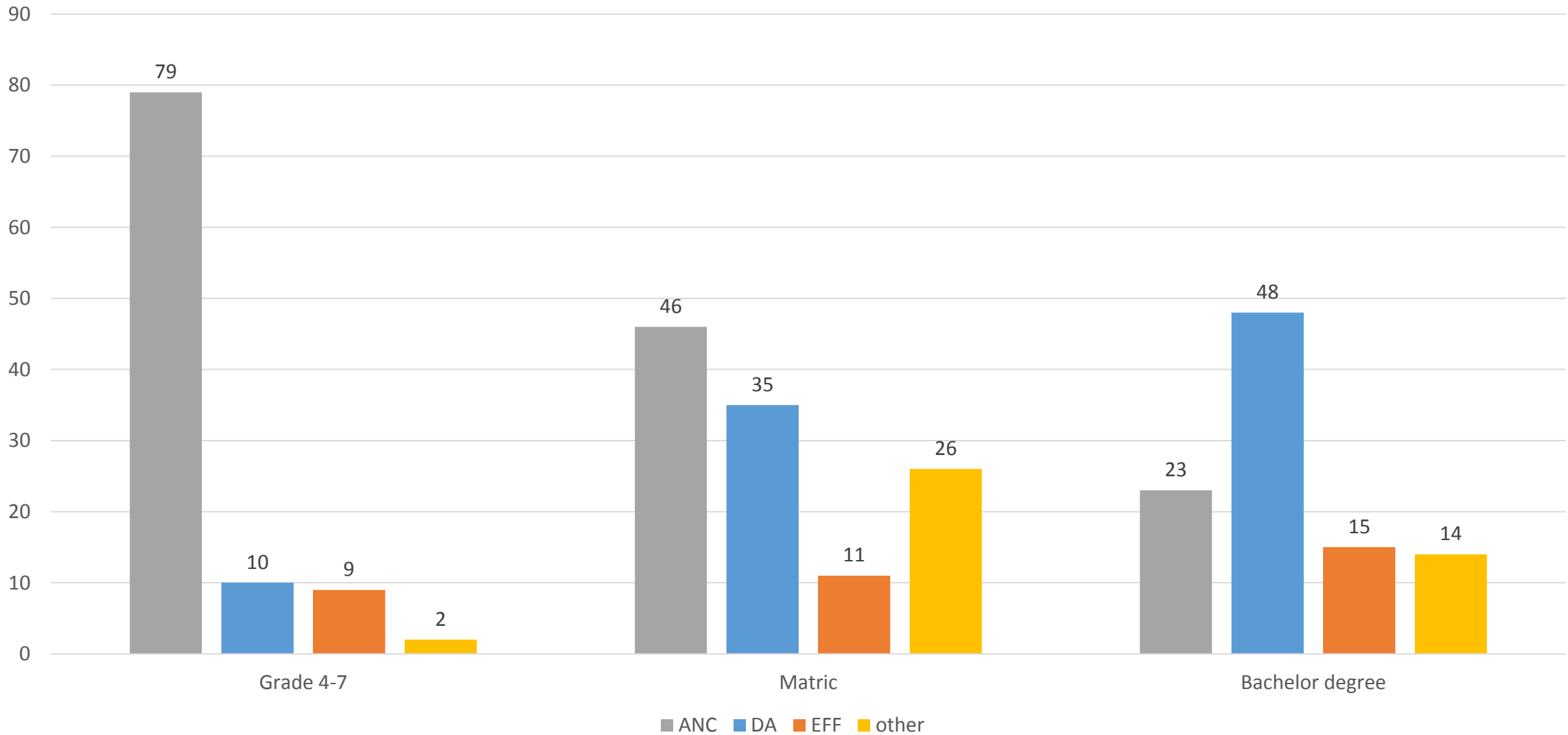
CRA polling on race relations



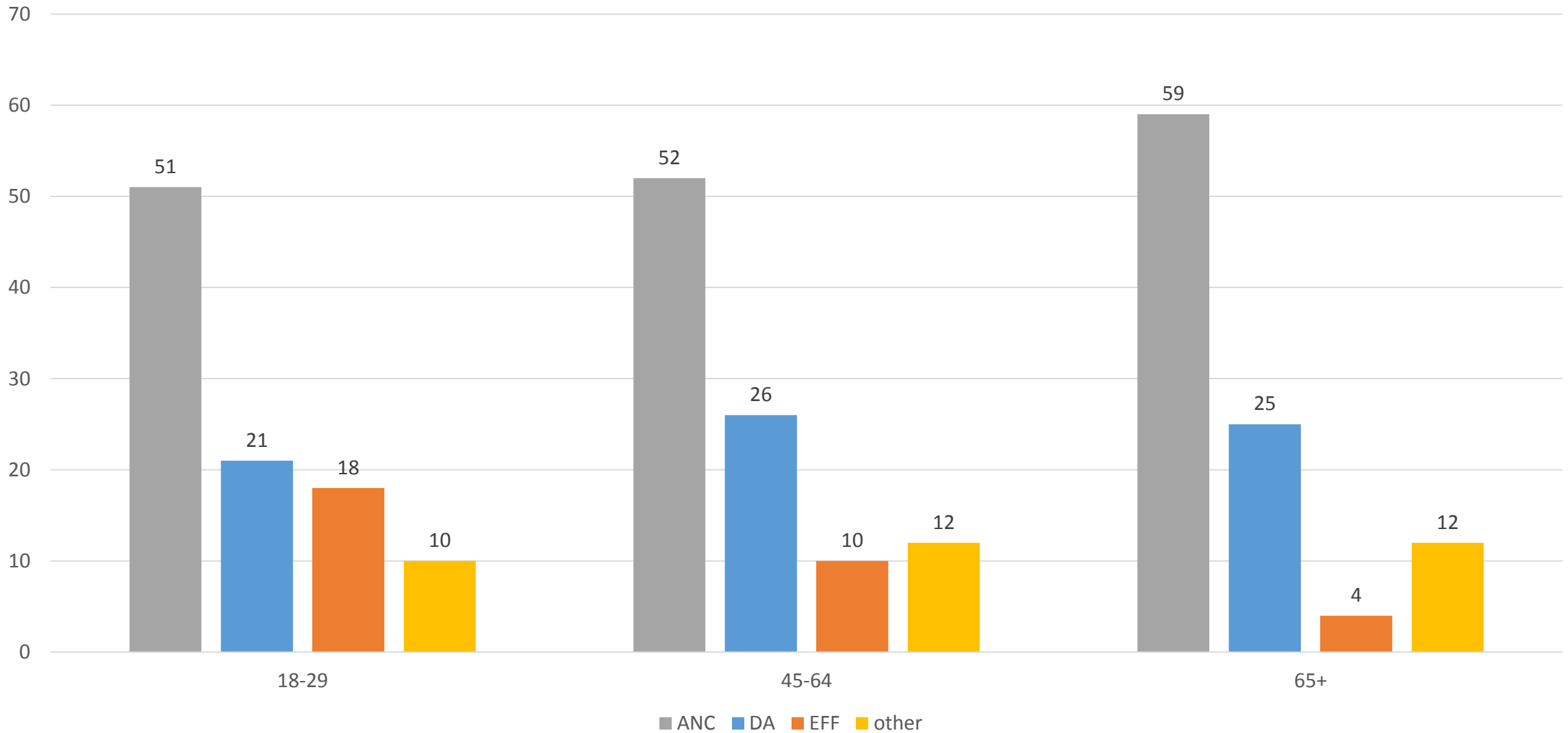
CRA political polling with undecided voters assigned



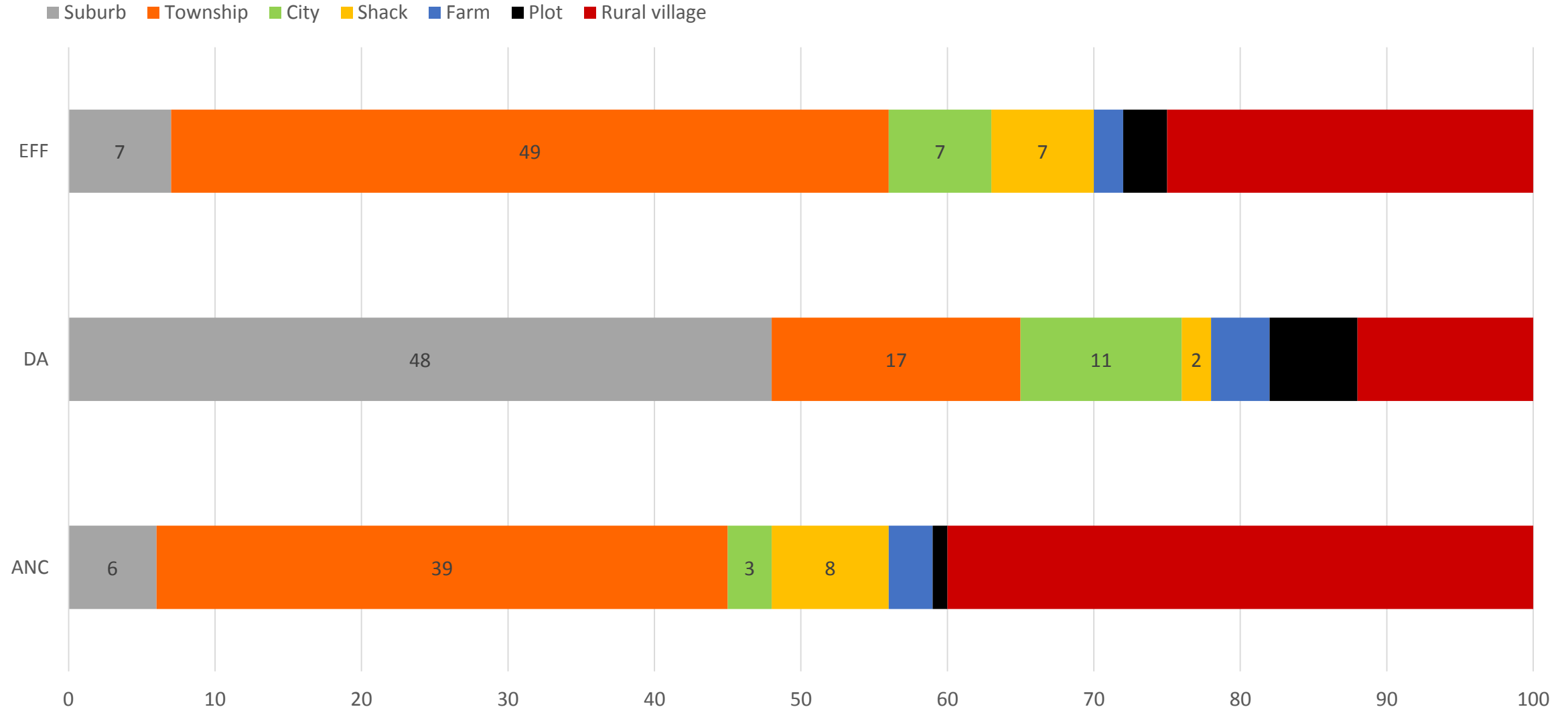
Party support by highest level of education



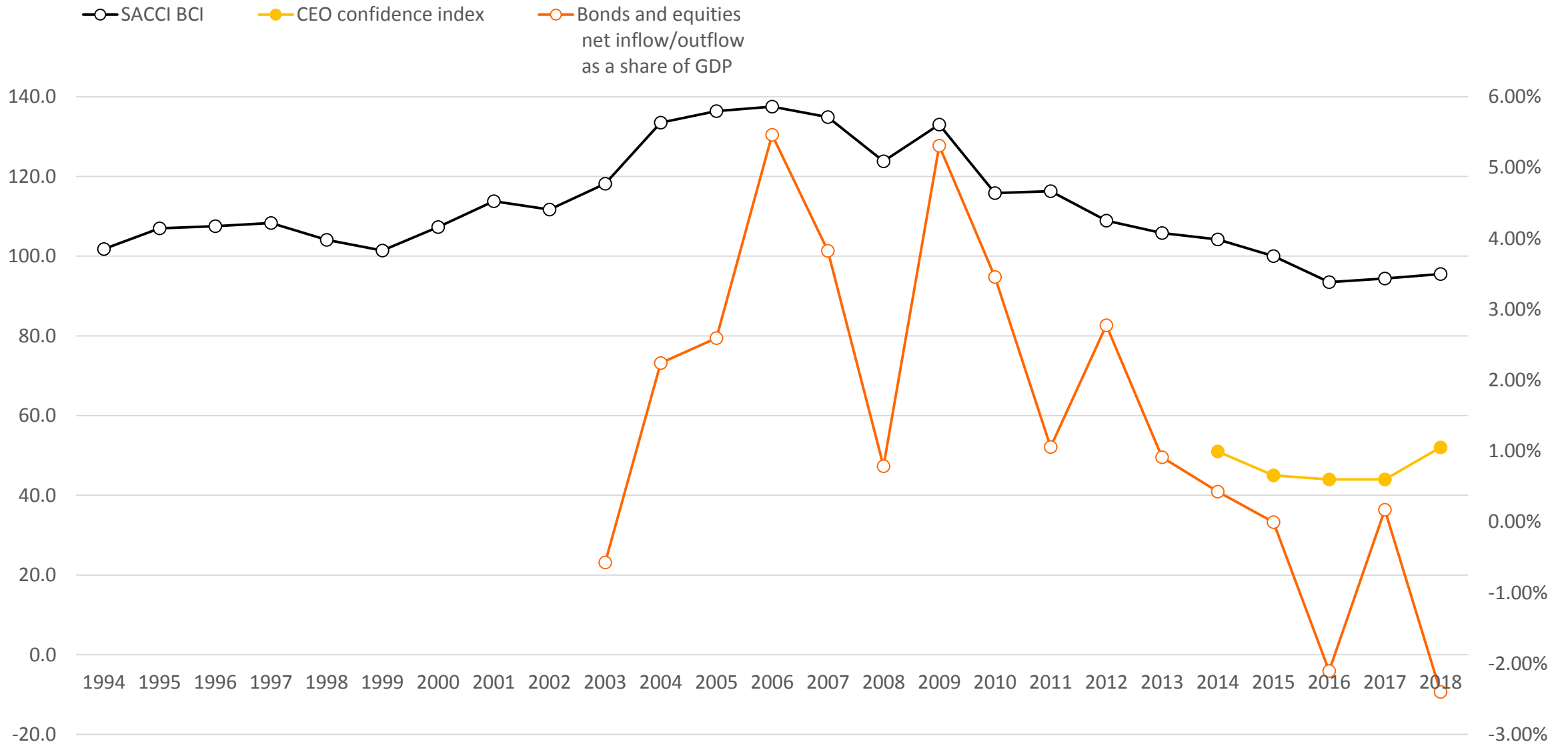
Party support by age



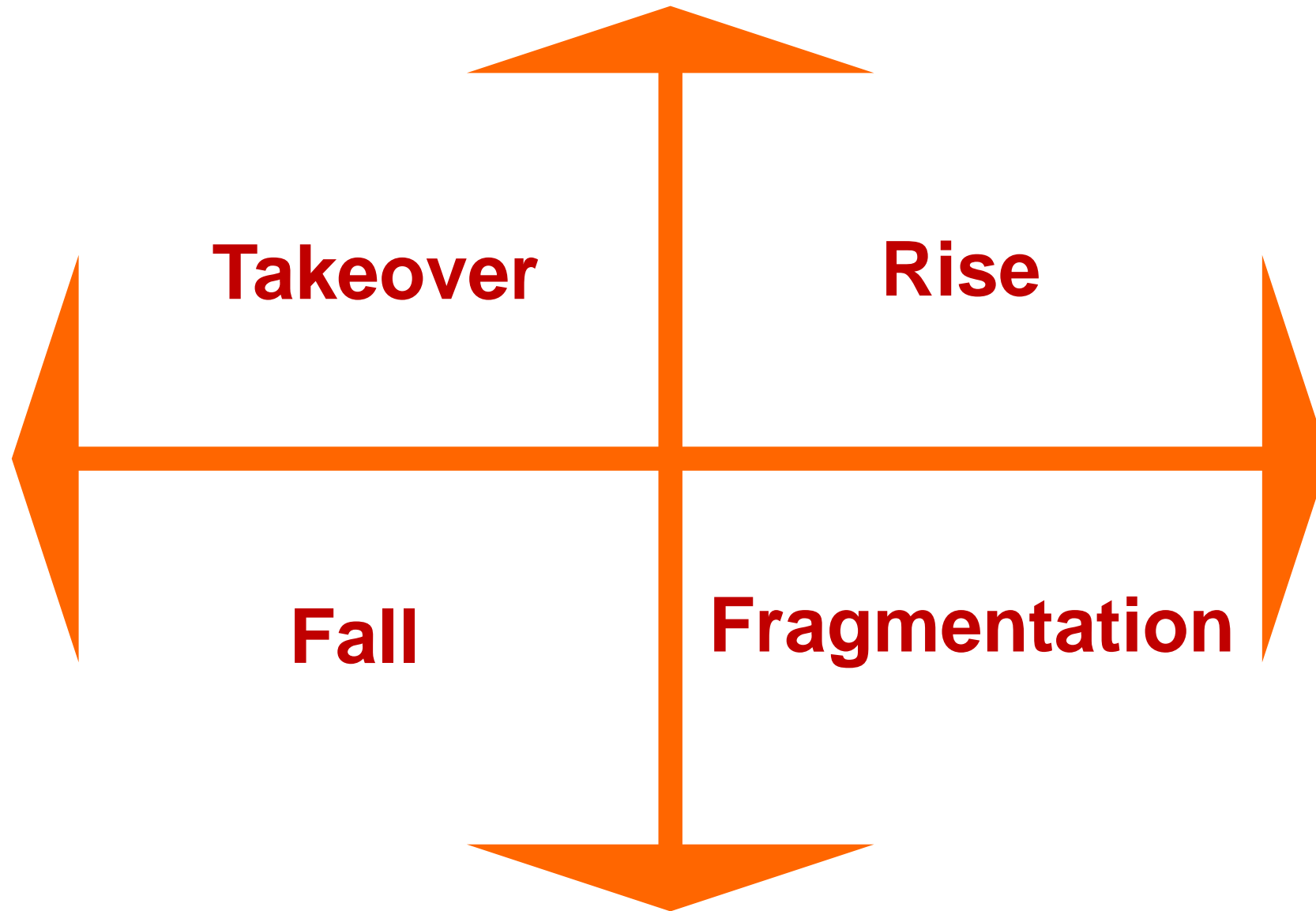
Party support bases by location



Confidence measures



Ideological modernisation



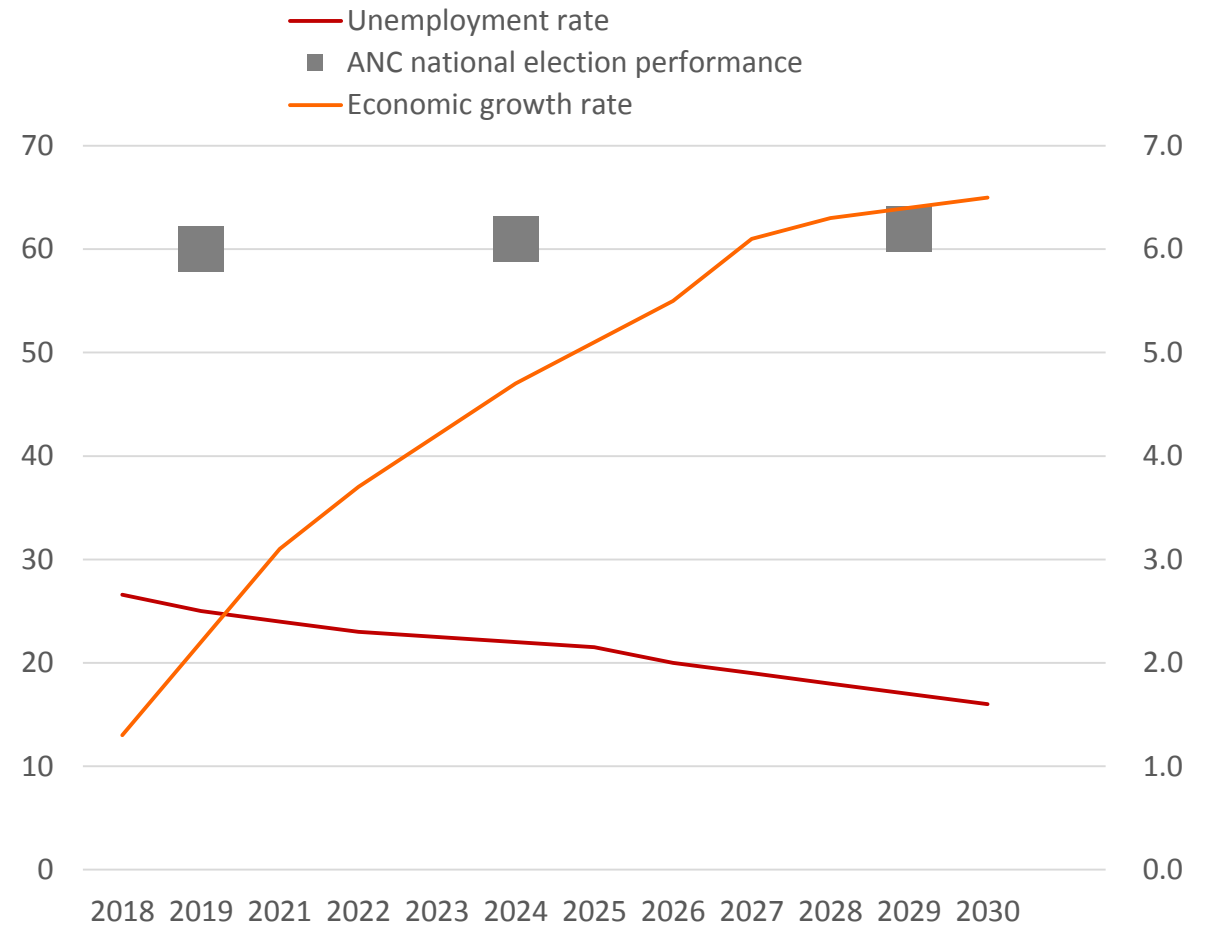
Strong
centrist
political
authority

Devolved
political
authority

Ideological stasis

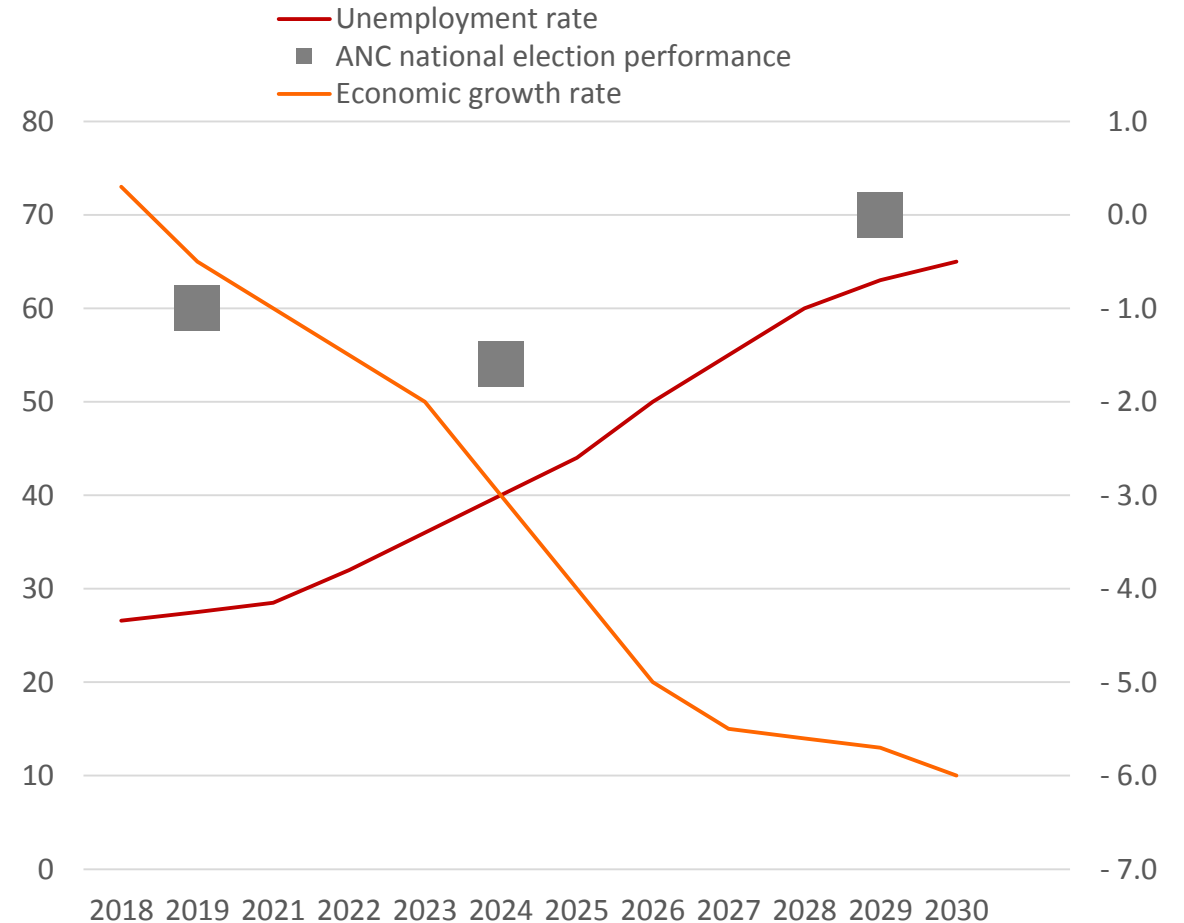
The Rise

On the back of a strong showing in the 2019 poll reformers stamp their authority on the ANC. Significant austerity measures are introduced. Failing state owned firms are sold. Private sector is central to economic recovery efforts. Empowerment policy is reworked. Property rights are secured. Labour market is deregulated and skilled immigration encouraged. Authority over schools and policing is increasingly devolved into communities. Corrupt politicians and related parties are tried and jailed in significant numbers. Racial nationalist incitement stops. Employment numbers rise sharply in unison with investment levels while living standards resume the upward trajectory last seen in the decade to 2007.



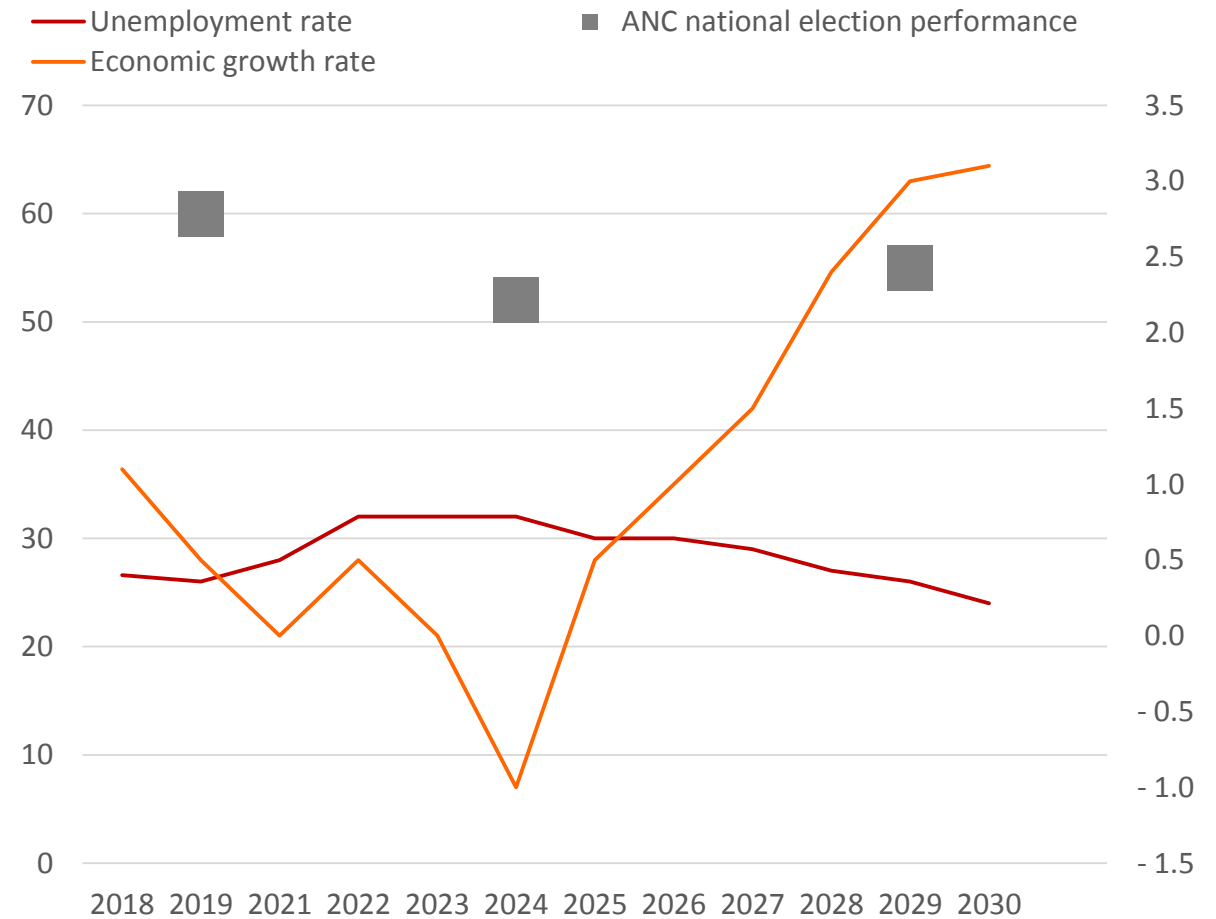
The Fall

Emboldened by a clear electoral majority dogmatic ideologues, racial nationalists, and state-capture suspects in the ANC eject reformers. A swift assault on property rights sets up a sharp erosion of civil liberties and the rule of law. Significant rights abuses follow. Capital and skills flight accelerates. The currency suffers a precipitous decline. Wealth extraction is prioritised over growth. The government mortgages the country's assets to an external creditor. South Africa slips into a decade deep recession amidst a steep decline in living standards joining the ranks of failed post-colonial African states.



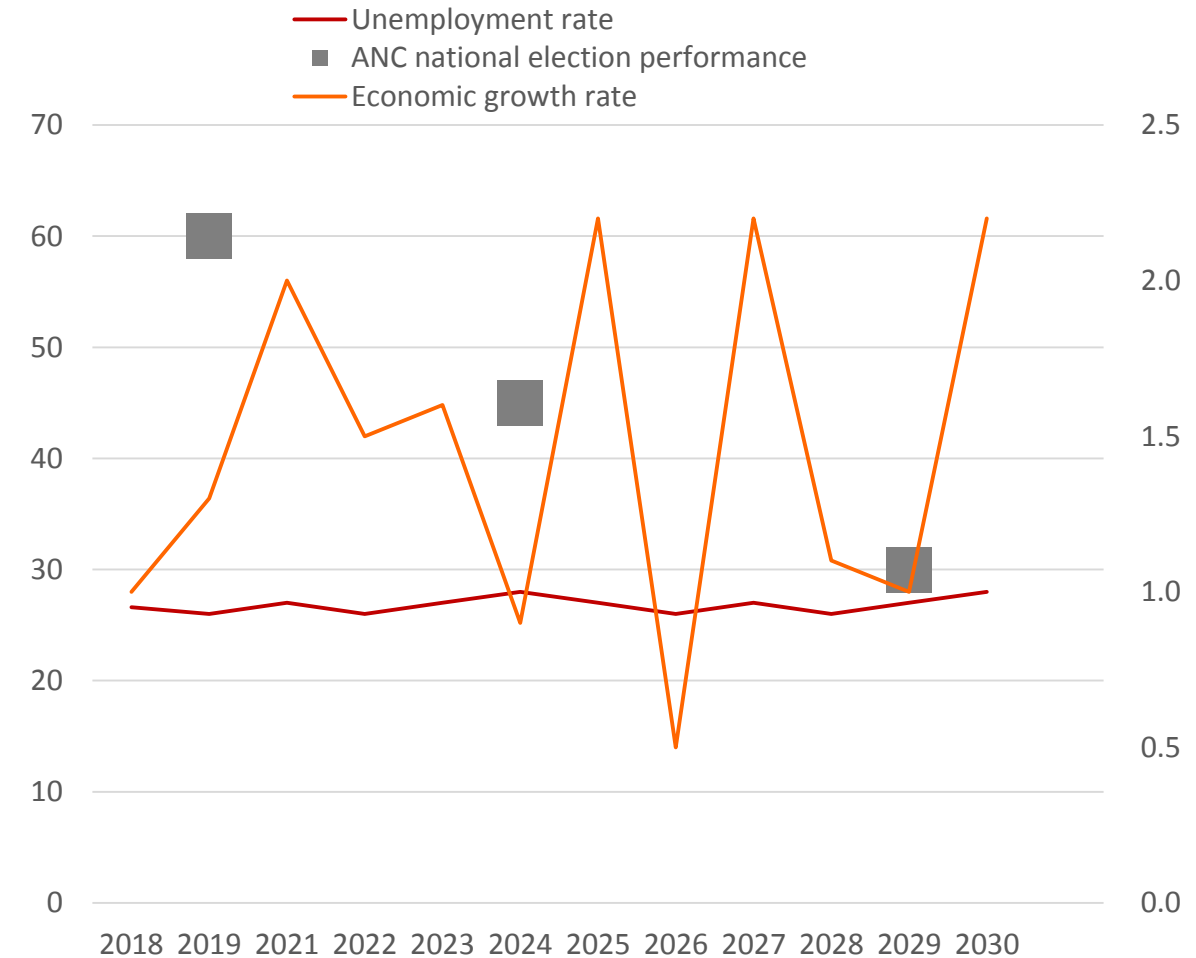
The Takeover

Little by way of reform materialises from the ANC. Token reforms and gimmicks are insufficient to raise growth as job creation stagnates and internal stability deteriorates. Midway through the era, perhaps prompted by a global pullback, debt and deficit levels push South Africa into a fiscal crisis amidst a sharp deterioration in living standards. The fiscal crisis attracts an external benefactor. The ANC in government, desperate in the face of future defeat, surrenders policy sovereignty to the benefactor opening the way to changes in policy direction which allow growth and investment levels to show some upward inclination towards the end of the era.



The Fragmentation

Factionalism and modernist/traditionalist tensions paralyse the ANC leaving policy contradictions intact. Growth underperforms EM norms by 50%+. Job creation stagnates, the real value of welfare payments fall, fiscal obstacles undermine patronage networks – collectively delivering a 2024 coalition government. But the coalitions are fatally fraught and paralyse the government. Without any effective central authority, and amidst deteriorating social cohesion, South Africa fragments into four sets of parallel authorities; corrupt localised political fiefdoms, near-feudal rural fiefdoms, gang-controlled urban slums, and private middle class enclaves – that play a role in cross-subsidising the broader society.



The Rise or Fall of South Africa in the 2020s

A strategic intelligence briefing



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