



SOUTH AFRICA
SCENARIOS 2030
INDLULAMITHI

The Indlulamithi South Africa Scenarios 2030 were launched in June 2018 as a multi-stakeholder, research-driven initiative to provide tools – in the form of scenarios – to focus leaders from different sectors and people from all walks of life on a key question: **What would a socially cohesive South Africa look like, and can we achieve it by 2030?** The scenarios are intended to support social compacts across all levels and sectors of society.

Three Scenarios express the ways in which South Africa might develop:

Nayi le Walk

A Nation in Step
with Itself

In a precise sequence of steps, **Nayi le Walk** choreographs a vision of South Africa where growing social cohesion, economic expansion and a renewed sense of constitutionalism get South Africa going.

iSbhujwa

An Enclave
Bourgeois Nation

Epitomising a loose-limbed, jumpy nation with a frenetic edge, **iSbhujwa** is a South Africa torn by deepening social divides, daily protests and cynical self-interest.

Gwara Gwara

A Floundering
False Dawn

In a nation torn between immobility and restless energy, **Gwara Gwara** embodies a demoralized land or disorder and decay.



The Indlulamithi Barometer provides an annual assessment of the direction South Africa is moving in relation to the three scenarios. The sophisticated scenario barometer measures the extent to which the different scenarios are materialising over time. The Barometer is updated annually on 'Indlulamithi Day' in June or July until 2030.

The three **key driving forces** are:



RESISTANCE, RESENTMENT,
RECONCILIATION

Resistance, resentment, reconciliation: indicators on national identity, personal identity, trust in institutions, shared sense of history and confidence in the future



INSTITUTIONAL CAPACITY
AND LEADERSHIP

Institutional Capacity and Leadership: indicators for state administrative capacity, policy making capacity, political representation, governance, accountability and civil society and the business environment



SOCIAL INEQUALITY

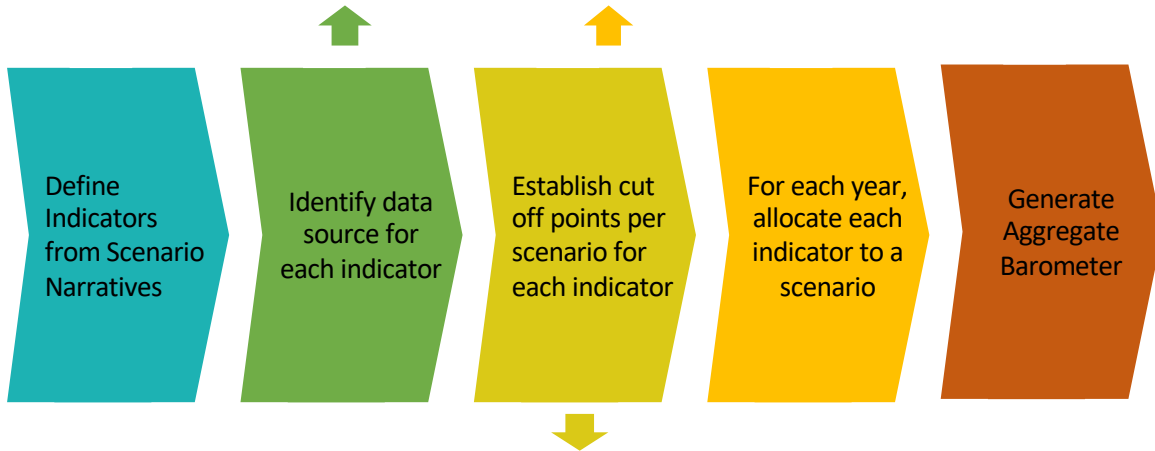
Social Inequality: indicators on the macro-economy, poverty, employment, education, health and safety

National Barometer Methodology

The Indlulamithi Barometer uses indicators compiled from published datasets generated by a wide range of reputable institutions, within South Africa and globally.

Recognised gov, non-gov and international data sources: e.g. StatsSA, Auditor General, DWAF, World Bank, Social Progress Index, Afrobarometer, etc.

2021 onwards:
New indicator cut-off points for 'worse scenario': GG+



Points of Comparison for Indicator Cut-off Points

1. Average for Upper Middle-Income Countries (WDI)
2. National Development Plan targets for 2030
3. SPI comparison with 15 countries with similar GDP
4. Global averages (in some cases)
5. Qualitative assessment (in some cases)

National Barometer Composition

The 54 indicators of the Barometer are organised into three **key driving forces**, and represent different elements of each. Together, they provide an overview of the various dimensions of South African society.



RESISTANCE, RESENTMENT,
RECONCILIATION



INSTITUTIONAL CAPACITY
AND LEADERSHIP



SOCIAL INEQUALITY

13 indicators

Public support for media freedom
Perceived freedom of speech and civic association
Sense of hope
Shared sense of history
Support for constitutional and democratic values
Trust in institutions
Identity

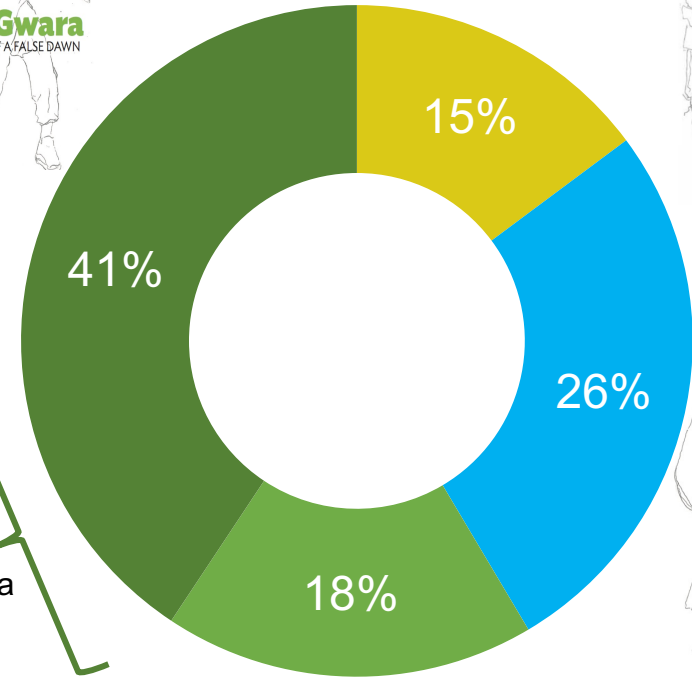
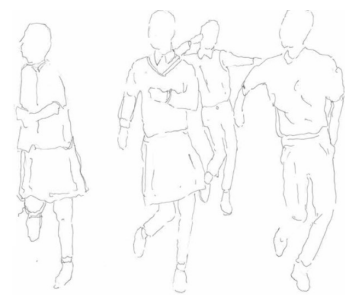
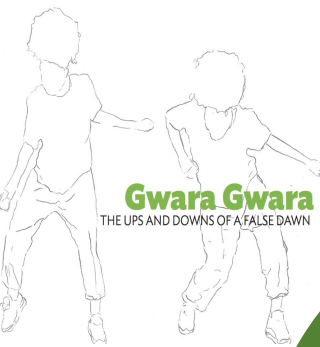
21 indicators

National state capacity
Municipal state capacity
Policy making capacity
Political representation
Political party stability
Political rights and civil liberties
Governance, accountability and Civil Society
Business environment

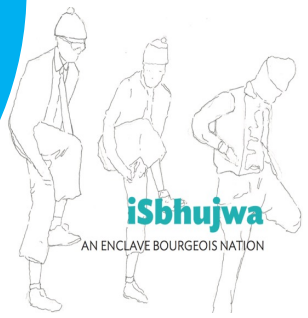
20 indicators

Macro-economy
Unemployment
Poverty
Food security
Education
Health
Safety
Gender wage gap

2023 Barometer



Nayi le Walk
A NATION IN STEP WITH ITSELF

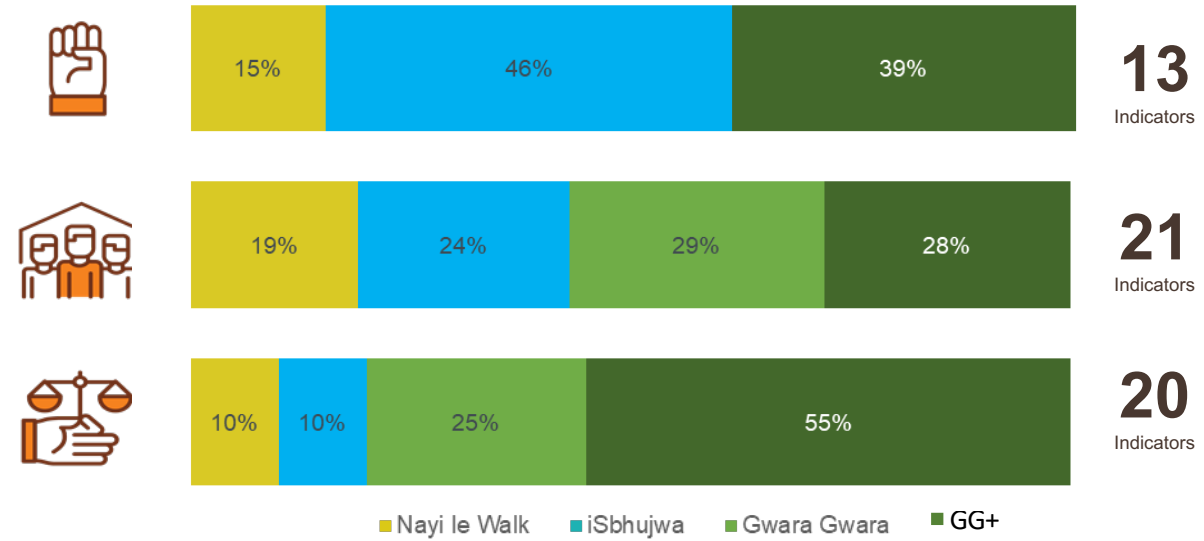


■ Nayi le Walk ■ iSbhujwa ■ Gwara Gwara ■ GG+

59%
GwaraGwara
and GG+

The **2023 Indlamithi Barometer** measures trends from July 2022-June 2023. It shows that South Africa is continuing to move deeper into the GG+ scenario (36% in 2022), marking a continued decline in social cohesion levels. However, the percent of indicators in the Nayi le Walk scenario have also improved.

2023 Barometer by Key Driving Force

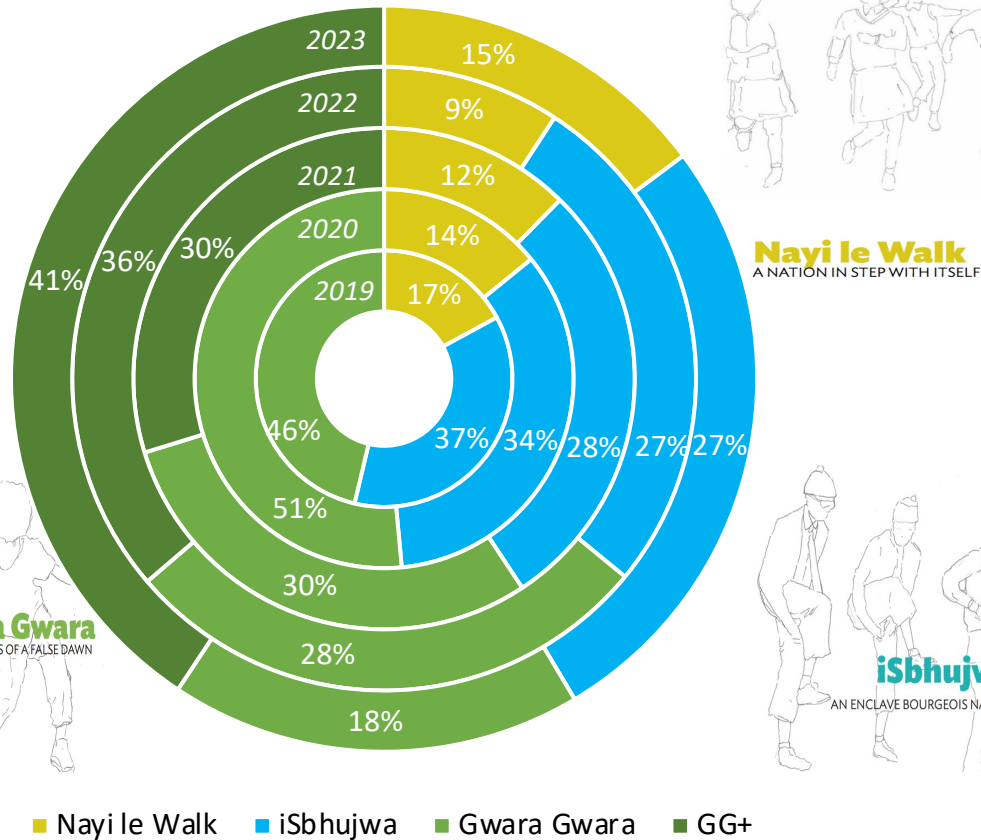


When viewed according to the three key driving forces, the 2023 Barometer shows that the **Gwara Gwara and GG+** scenarios remain dominant across all Key Driving Forces. The darker green GG+ represents a deeper form of Gwara Gwara, which shows how indicators that have been in the Gwara Gwara scenarios for several years are still declining.

The Gwara Gwara and GG+ scenarios are most pronounced in relation to Social Inequality, as in previous years. This shows that the every-day life of the majority of South Africans is already deeply in the GG+ scenario.

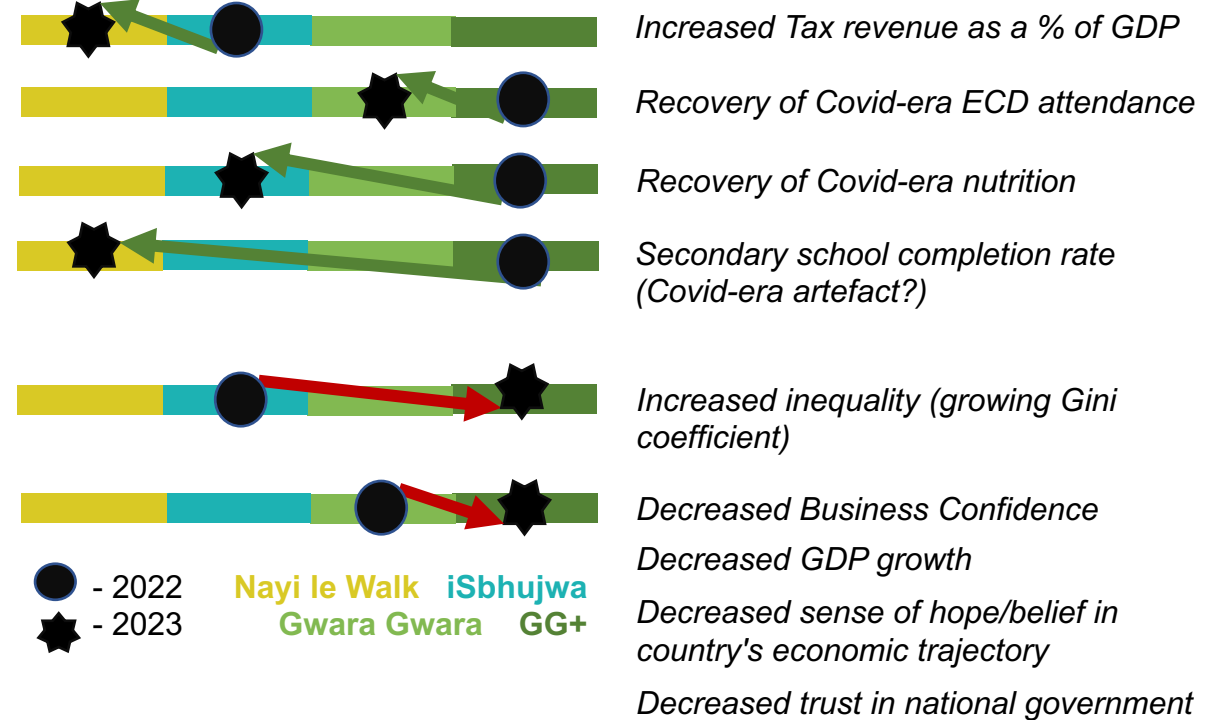
How do we get from **here** to a **socially cohesive** South Africa?

2019-2023 Barometer Trend



The trend from 2019 to 2022 was been a continuous decline toward the Gwara Gwara scenario, moving from 46% (GwaraGwara) to 64% (combined GwaraGwara and GG+). 2023 has seen a slight rebound in the cumulative GwaraGwara/GG+ results (59%). It is too early to say whether this represents a 'rebound' from Covid-19 or is a temporary slowing of a downward trend.

Indicator Shifts from 2022 to 2023



The 2022-2023 shifts in the National Barometer are due to movement in the indicators above. Upward shifts are largely related to recovery from Covid-era challenges (some of which may be temporary data shifts rather than changing underlying conditions) while the downward shifts are fundamental structural challenges for the country.