



Welcome to launch of the

INDLULAMITHI SOUTH AFRICA 2035 BAROMETER





Journeys into our future

Indlulamithi Scenarios to 2035



Hadeda Home

A noisy nation where everything is blamed on someone else, a country where squabbling coalitions lead South Africa to economic stagnation.



Weaver Work

A nation where a renewed spirit of collaboration between a capable state, civil society, and activist business achieves economic expansion to get South Africa going.



Vulture Culture

A desperate nation where populist politics prevail, a country where criminal syndicates have captured the state and lead South Africa to economic collapse.



2026 Barometer and Perception Survey



From Scenarios to Barometer



The Scenarios ask:
What may happen?
so that
We can plan collectively



The Barometer asks:
What is happening,
and which Scenario does it resemble?
so that
We can act collectively

Barometer Goal: Catalyse Collective Action



What does it take to Act?

Shared picture of the country's current condition and trajectory

enabling

Shared sense of urgency

and

Conversation across sectors

while

Retaining enough nuance to inform
prioritisation

to

Catalyse Collective Action

**Use the Barometer to
facilitate conversations
that build:**

A sense of possible action
in your personal and
institutional roles in society
(action)

A sense of whom to act
together with (collective)

Barometer Design

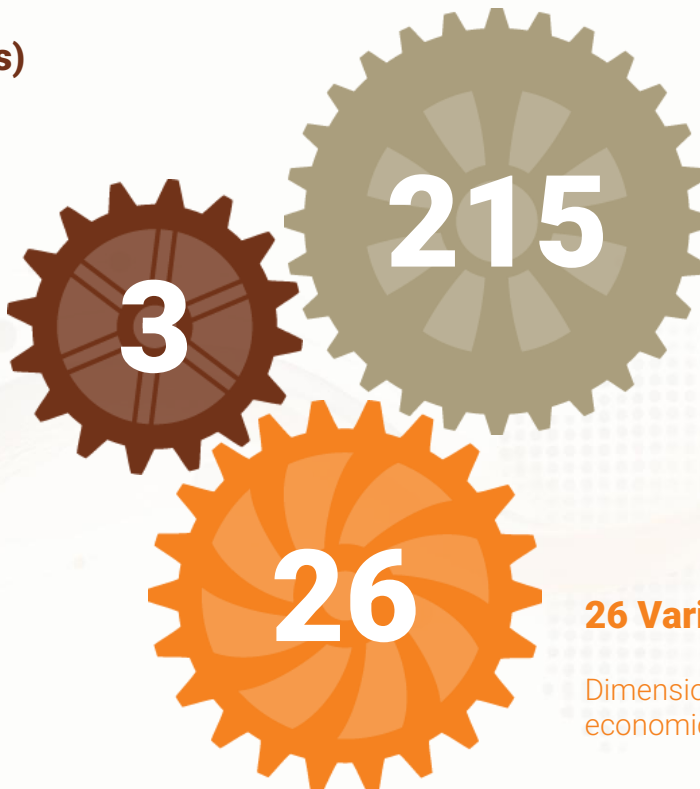


3 Key Driving Forces (KDFs)

1. Economy
2. Institutions & governance
3. Societal attitudes and relations

The Barometer brings together **215 indicators** to produce an annually updated picture of South Africa's current condition and to describe this reality in terms of the Indulamithi Scenarios.

Year-on-year Barometer comparisons will show the country's **trajectory**: which Scenarios seem to be 'coming true' over time.



215 Indicators

Annual empirical data points

With associated data sources

How are the indicators interpreted?

Indicator Scenario Classification
Weighting
Aggregation

26 Variables

Dimensions of social, political and economic life.

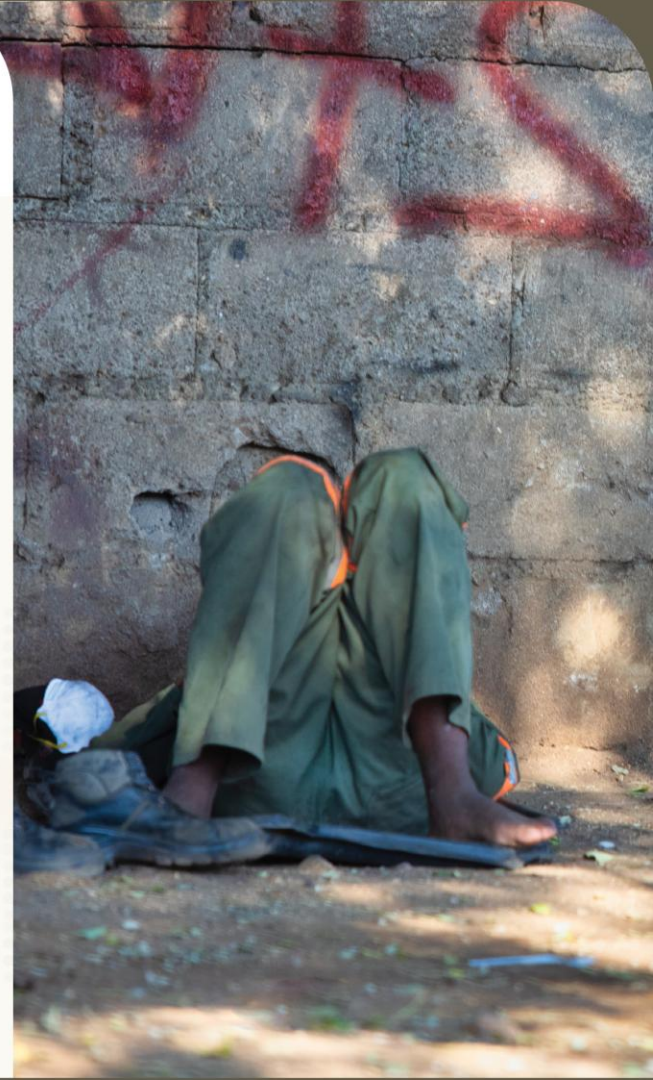
Barometer Design – KDF Indicators



KDF 1: Low Economic Growth Trap

(80 data points,
36% weighted indicator contribution to
Barometer total)

- Investment & growth
- Labour market & living standards
- Fiscal health
- Social protection
- Business environment & private-sector accountability
- Climate, energy & digital transition
- Informal economy & cultural industries recovery
- Regional & global economic integration



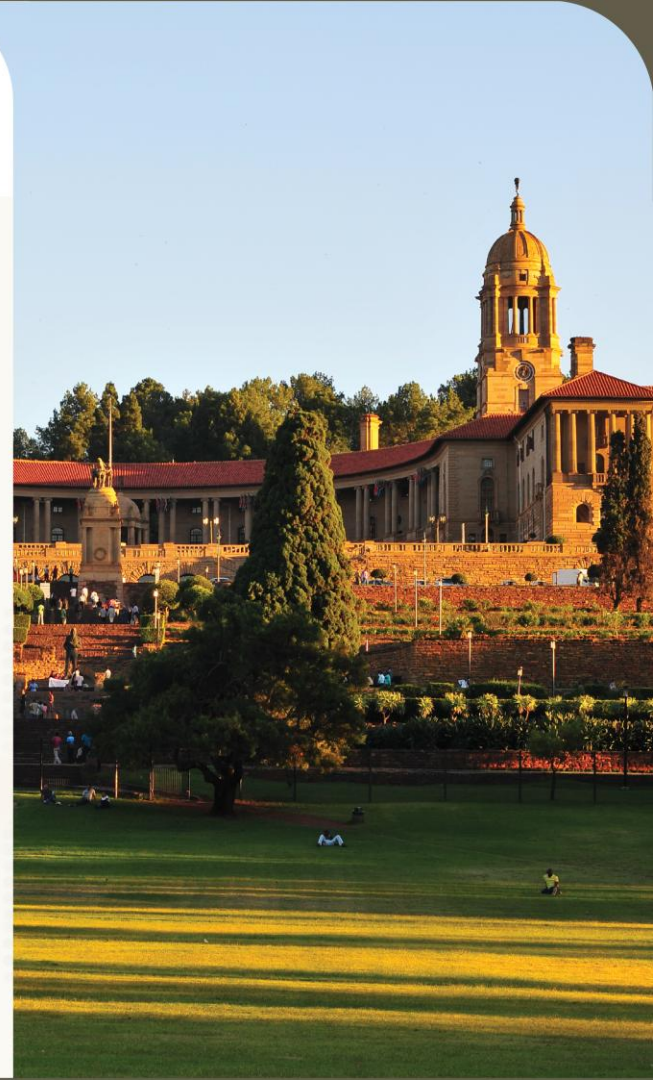
Barometer Design – KDF Indicators



KDF 2: State weakness and declining accountability

(57 data points,
35% weighted indicator contribution to
Barometer total)

- Public service delivery & municipal capacity
- National leadership & institutional effectiveness
- Democratic health & party politics
- ANC internal dynamics
- Corruption & accountability
- Civil society & youth civic engagement
- Migration & immigration



Barometer Design – KDF Indicators



KDF 3: Internal security threatened by anger, distrust and resistance to renewal

(78 data points,
29% weighted indicator contribution to
Barometer total)

- Historic trauma & social cohesion
- Gender-based violence & patriarchy
- Social unrest & trust
- Youth marginalisation
- Health & crime
- Land reform
- Education duality
- Emerging security threats



Barometer Design



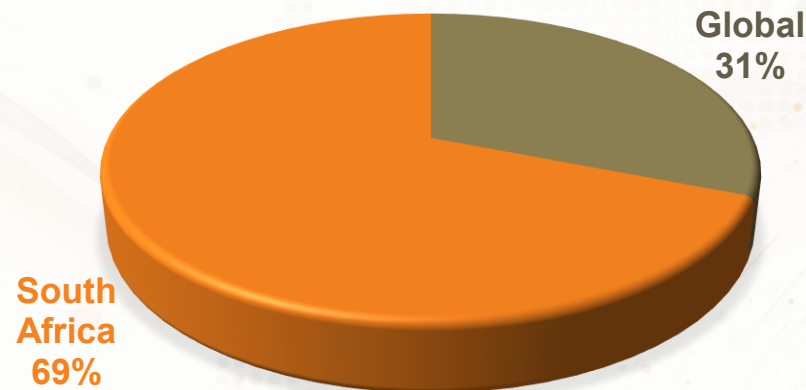
The Barometer data is drawn from **reputable published secondary data sources**

93 unique secondary data sources

Most commonly used sources:

- Statistics SA (27 indicators)
- Treasury (14)
- World Bank (12)
- Afrobarometer (7)
- SARB (6)
- ILO (6)
- HSRC (6)
- Etc...

DATA SOURCES:
South African vs Global
(% of all Indicator Rows)



Barometer Design: Key Driving Forces

Low Economic Growth Trap



Some examples of indicators and data sources include:

KDF 1: Low Economic Growth Trap



Examples: different indicators point to different scenarios

Variable 8: There is declining accountability and social responsibility of the private sector, limiting partnerships for collective good.

Indicator 8.1: Corporate Governance Quality, ESG Compliance, and Ethical Business Conduct.

Data Source: JSE (Johannesburg Stock Exchange) ESG Disclosure and Sustainability Reporting Data.

Data Point 2025: JSE-listed companies sustainability reporting now near-universal among larger listings and ESG disclosure increasingly assured rather than self-declared.

Scenario Classification: Weaver

Variable 10: Emerging technologies and innovations present opportunities but are not maximised or managed for benefit and we witness an increasing digital divide.

Indicator 10.1: Internet Access and Broadband Penetration Gaps Across Income Groups and Geographies

Data Source: Statistics South Africa (StatsSA) General Household Survey

Data Point 2024: Overall access improving (82.1%) but urban-rural and racial gaps persist. Digital divide narrows slowly

Scenario Classification: Hadedu Home

State weakness and declining accountability



KDF 2: State weakness and declining accountability

(local government trust erosion – approaching collapse in some domains – aligns with Vulture Culture's broken public services)

Barometer Design: Key Driving Forces

Internal security threatened by anger, distrust and resistance to renewal



Some examples of indicators and data sources include:

KDF 3: Internal security threatened by anger, distrust and resistance to renewal



Examples: global data sources provide points of comparison

Variable 19: Persistent high youth unemployment, high rates of social dislocation and youth alienation.

Indicator 19.3: Youth Socio-Economic Marginalisation.

Data Source: World Bank Employment Trends for Youth, August 2026

Data Point 2028: South Africa has consistently ranked among the top 5 worst performing countries in the world for youth unemployment.

Middle-income homicide rate (44 vs 6 per 100,000). A homicide rate that places SA persistently in the world's worst five, coupled with a crime burden costing at least a tenth of GDP each year

Scenario Classification: Vulture Culture

2026 Barometer – National Aggregate



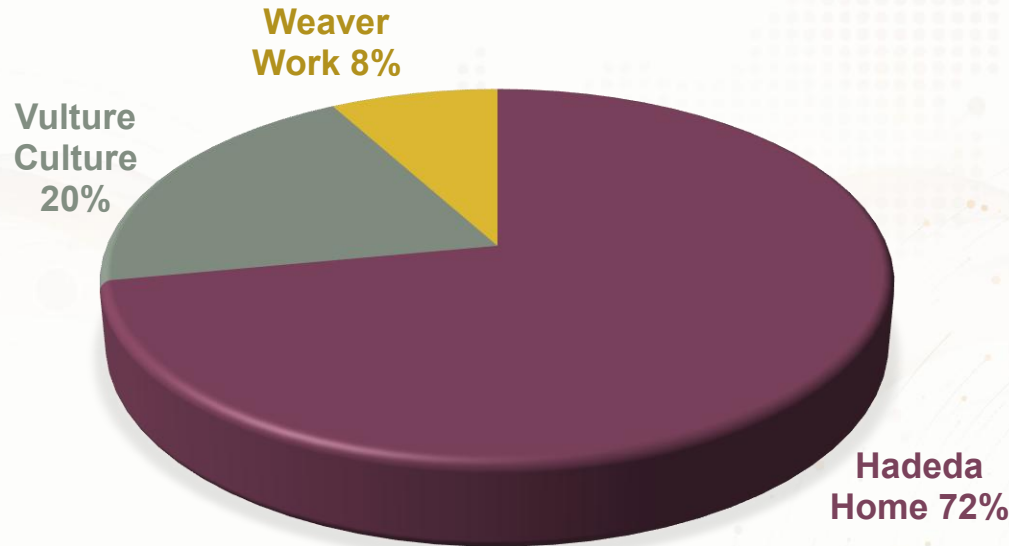
Hadeda Scenario was designed as 'business as usual' in 2025.

Barometer data confirms this.

Current indicators that look like **Vulture Culture** could be part of the early **Weaver** storyline...

... the path is not yet set in stone.

Overall Scenario Distribution



2026 Barometer - Scenario Distribution by KDF



Vulture Culture



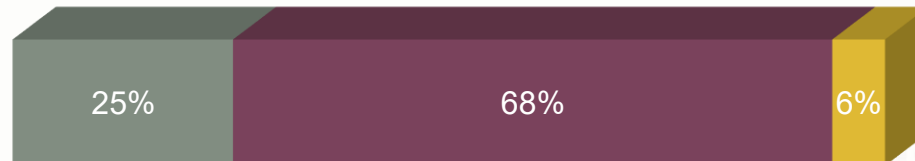
Hadedu Home



Weaver Work



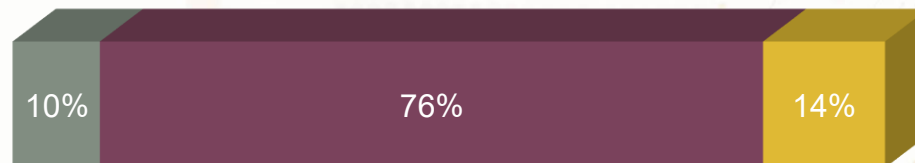
Internal security threatened by anger, distrust and resistance to renewal



State weakness and declining accountability



Low Economic Growth Trap





Perception Survey



From Scenarios to Barometer to Perception Survey



Qualitative primary research

The Scenarios ask:

What may happen?

so that

We can plan collectively



Quantitative secondary data

The Barometer asks:

**What is happening,
and which Scenario does it
resemble?**

so that

We can act collectively



Quantitative primary data

The Perception Survey asks:

**What do South Africans
experience**

**and which Scenario does it
resemble?**

so that

**We can link with collective hope
and action**

Perception Survey: Whose Voices?



National Sample:

5768

Weighted to be representative by

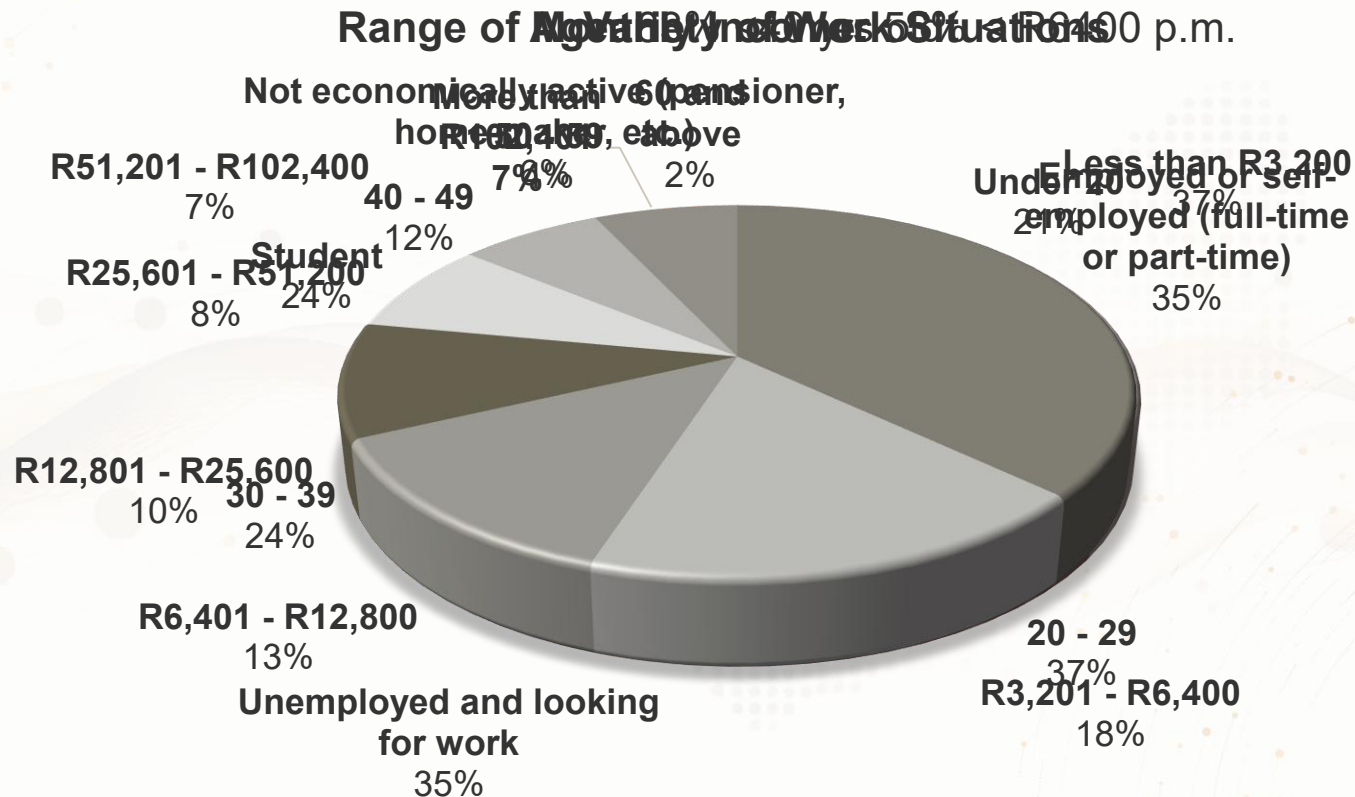
- Gender (50/50)
- Province
- Population Group

Data collected

April – May 2026

Survey conducted with

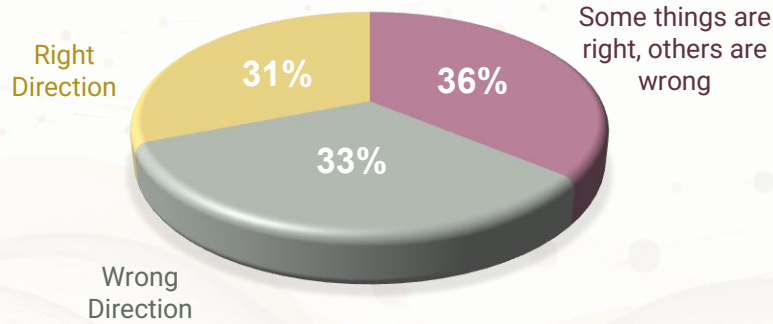
SEBENZA



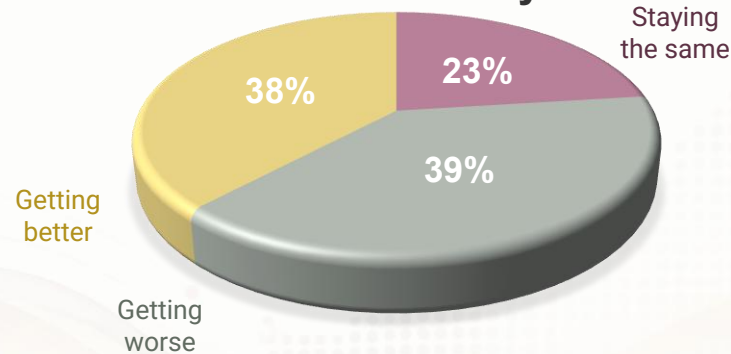
Perception Survey Results: Past 12 Months



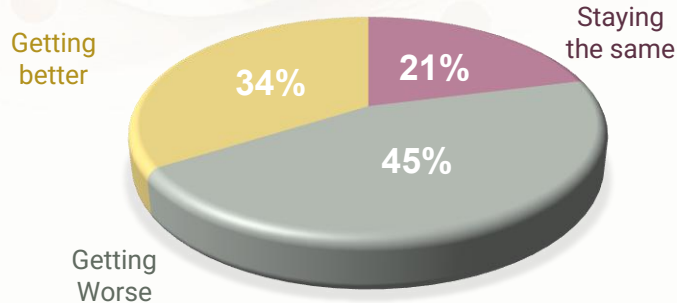
Country Direction



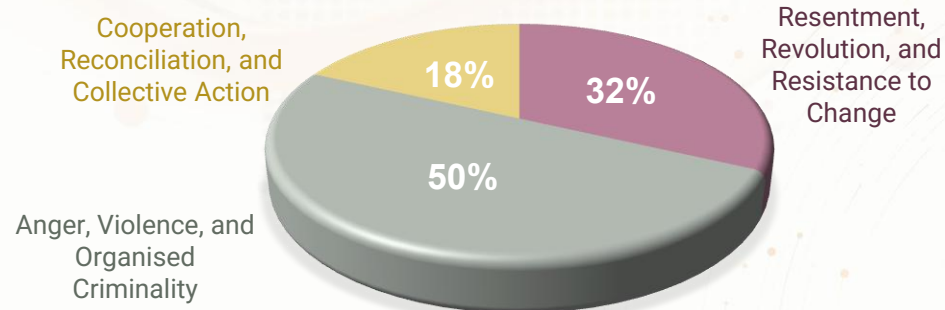
State Capacity & Accountability



Economy

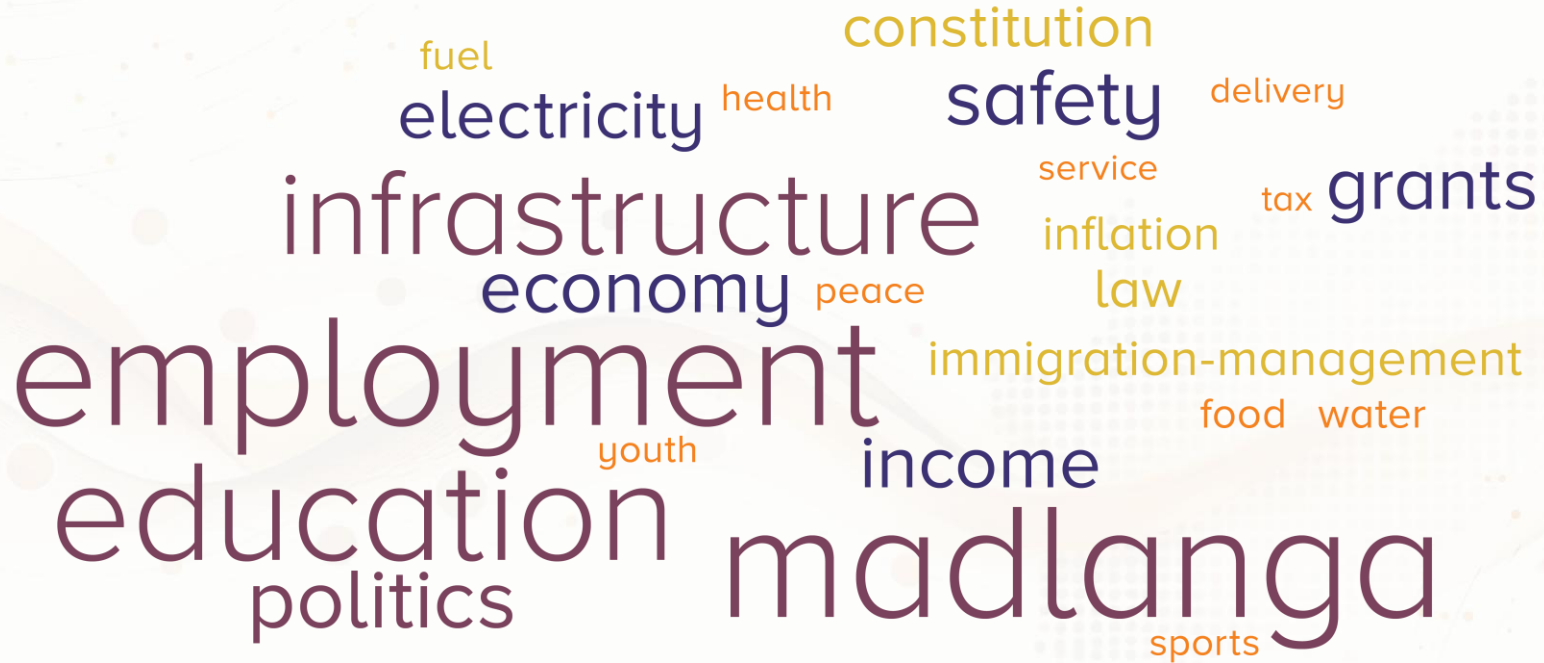


Sense of Nation/Feeling



Perception Survey Results

Going in the Right Direction



Perception Survey Results

Going in the Wrong Direction



Perception Survey Results: Expected Scenario



Which of the following best describes the South Africa you think will emerge in the next twelve months?

(April 2026 – May 2027)



Vulture Culture

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Weaver Work

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Hadeda Home

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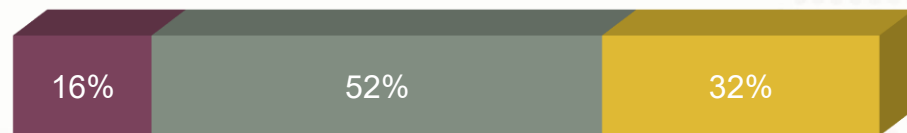


Vulture Culture



Weaver Work

Perception



Compared to....

Barometer



Perception survey results are weighted by gender and province.

Perception Survey Results:

Where does the Hope Lie?



Hadedu Home

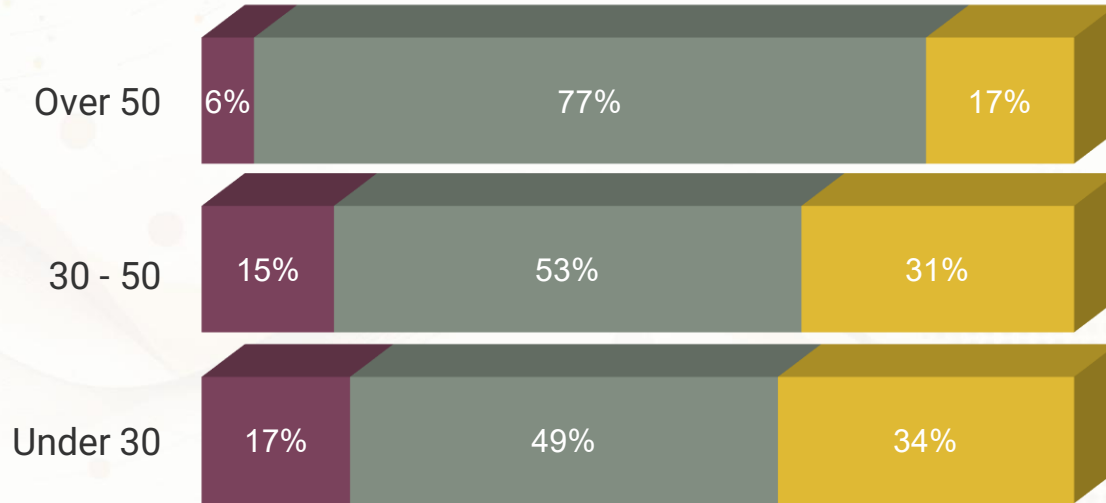


Vulture Culture



Weaver Work

SA Next 12 Months: By Age Group



No difference
by gender

Perception survey results are weighted by gender and province.

Perception Survey Results:

Where does the Hope Lie?



Hadedu Home

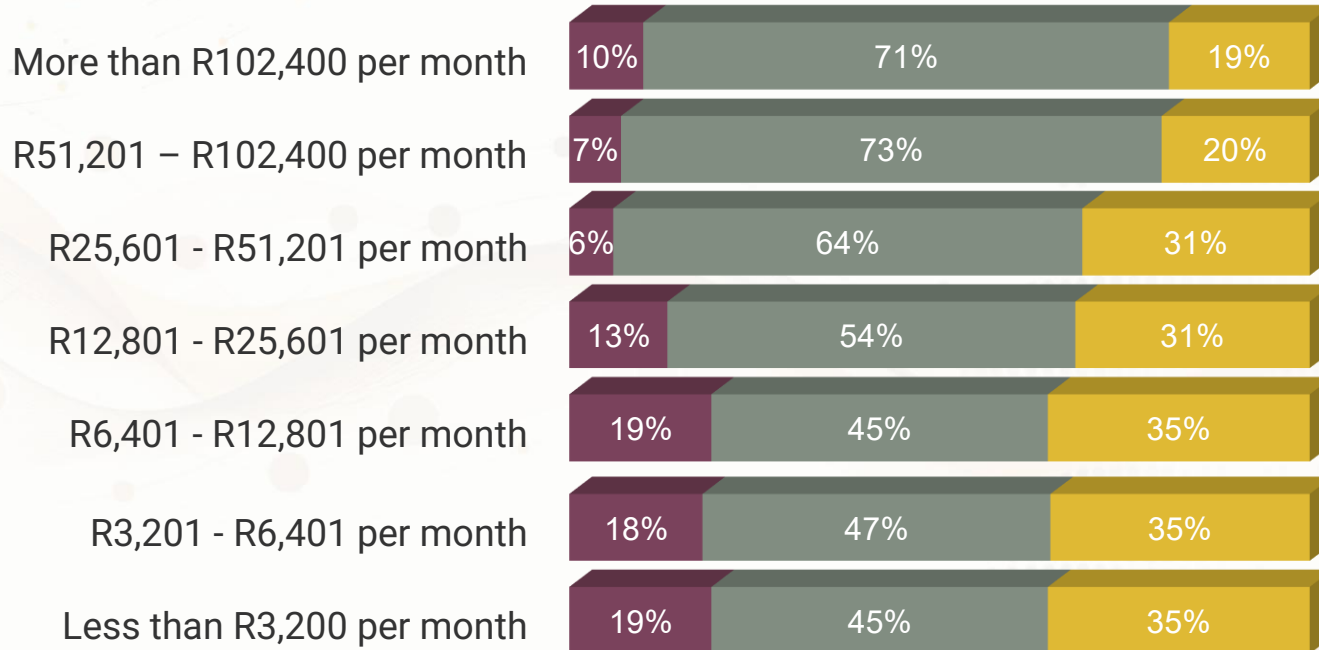


Vulture Culture



Weaver Work

SA Next 12 Months: by Income Group



Perception survey results are weighted by gender and province.

To conclude:

Please share your own views
about the country's direction and
the Indlulamithi Scenarios through
this short questionnaire:



<https://forms.gle/MwKMY55MFEyAZqxp6>





Thank you