

SOUTH AFRICA'S THIRD AGE

IRR Friends Briefing



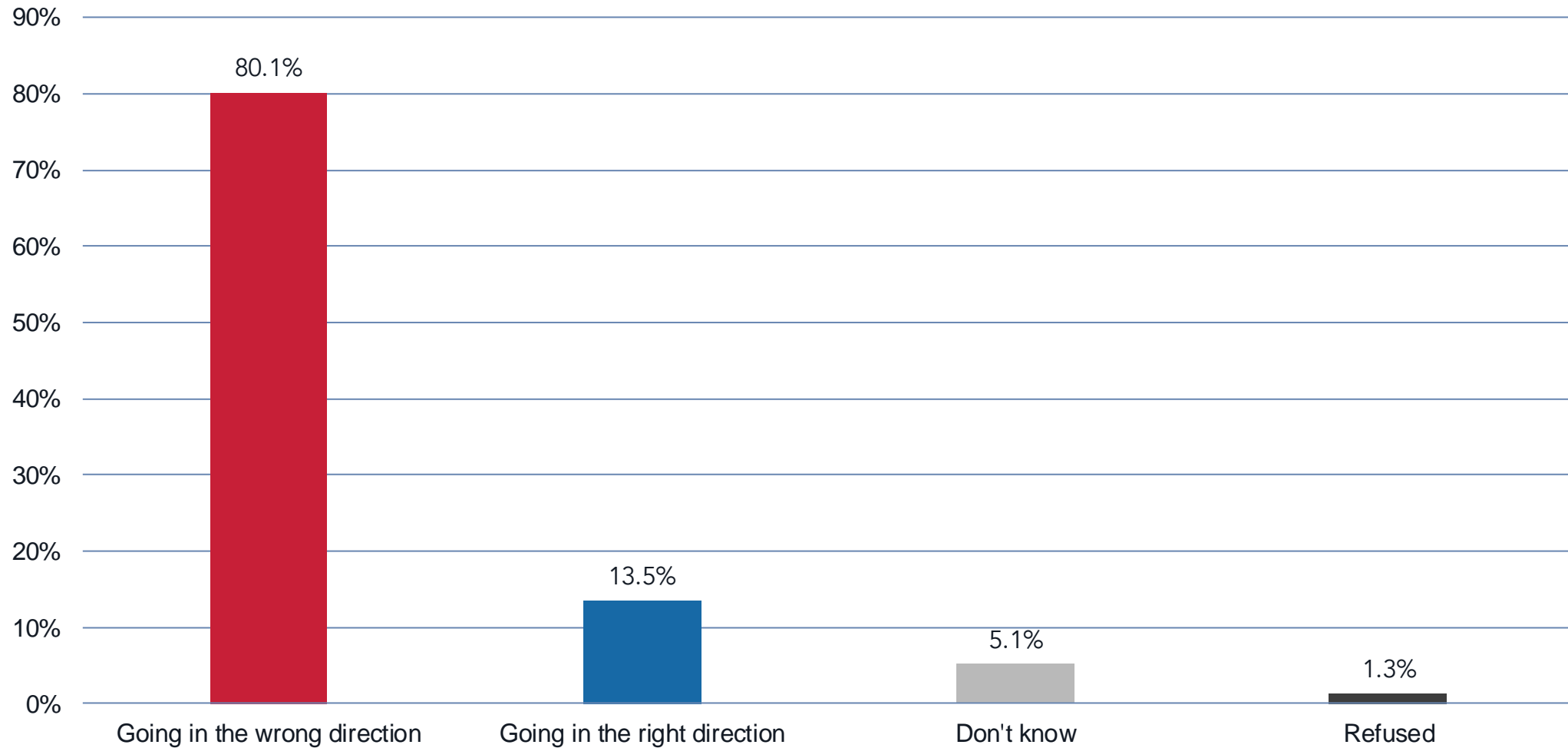
John Endres
19 October 2023

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The nation's state of mind

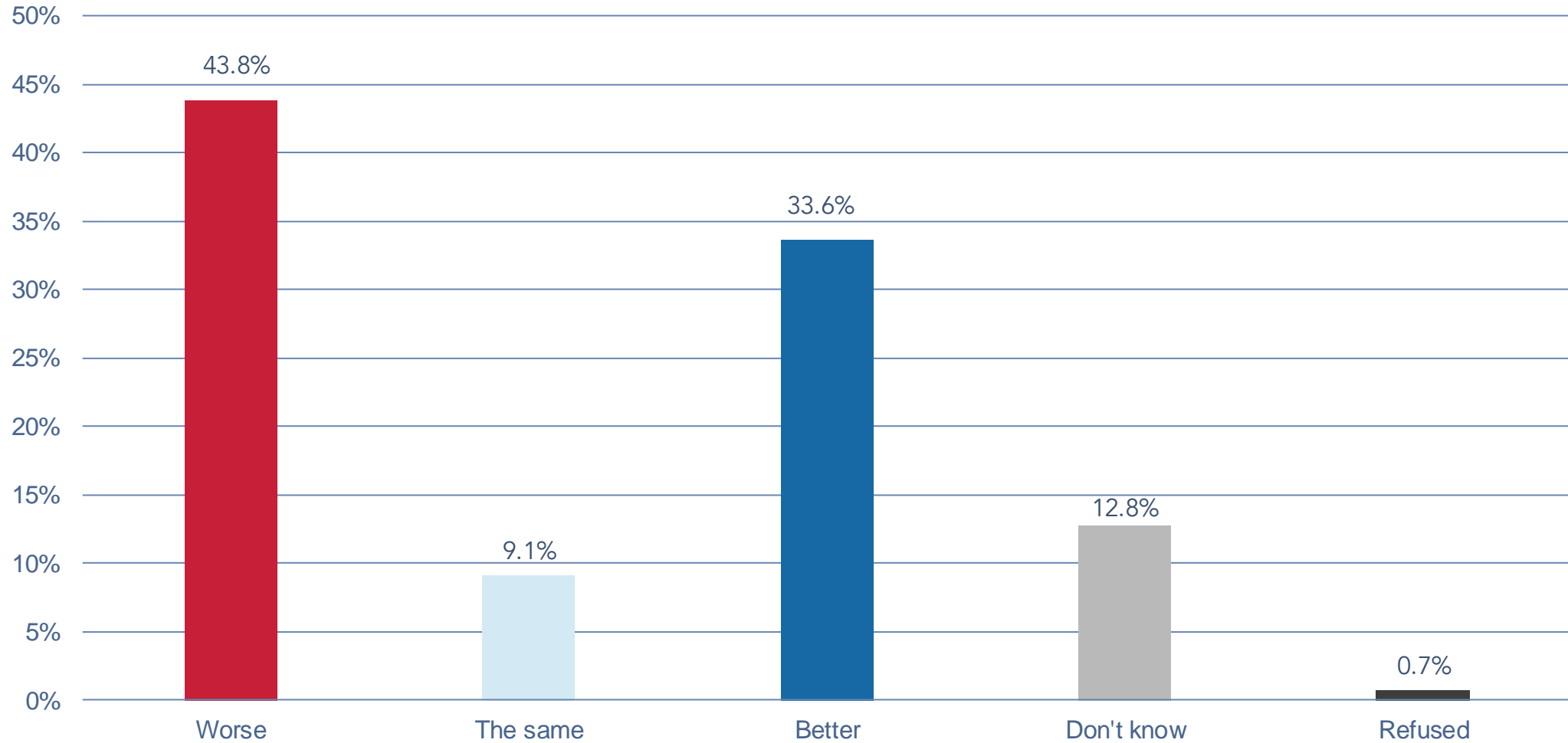


Is the country going in the wrong direction or in the right direction?



Source: Brenthurst Foundation, 2022

Do you think life 5 years from now will be better, the same or worse than today?



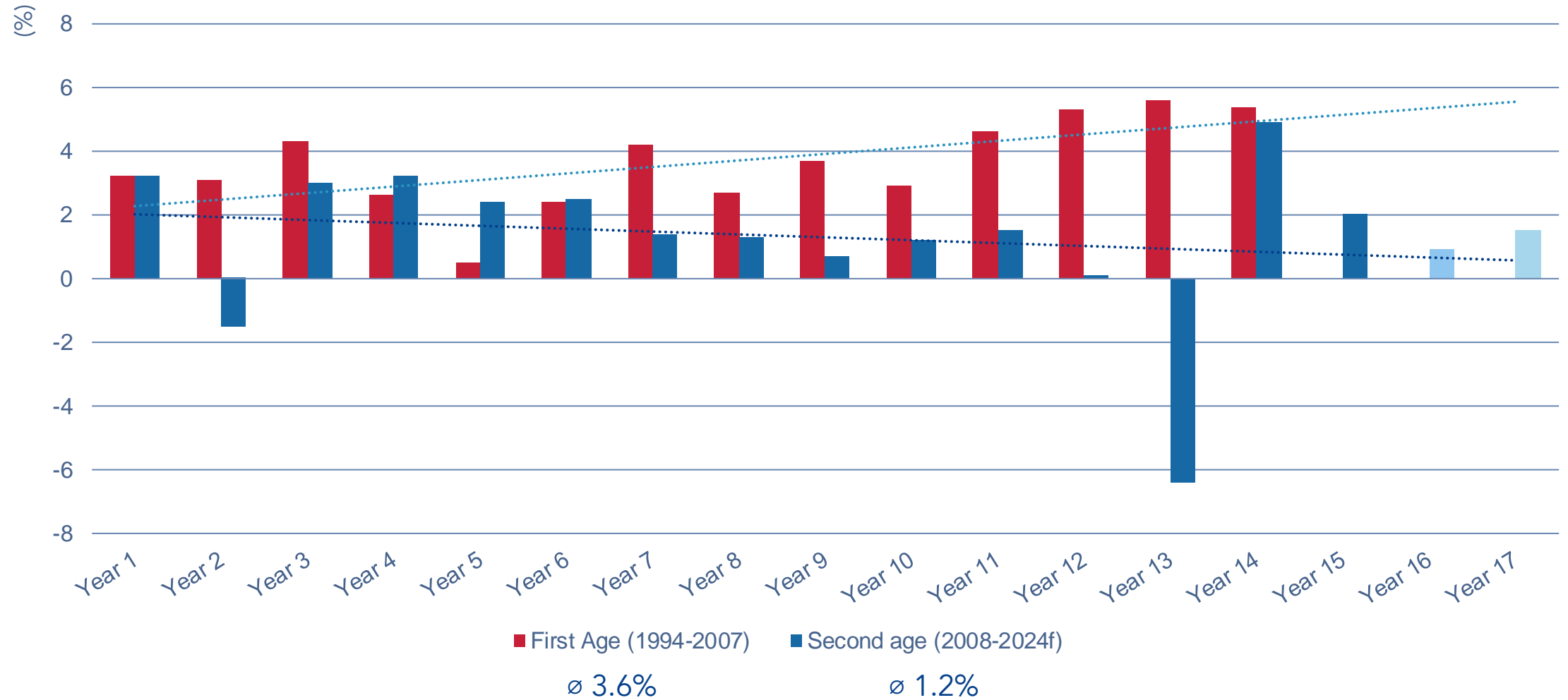
Source: IRR polling, 2022

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How we got here: A tale of two ages



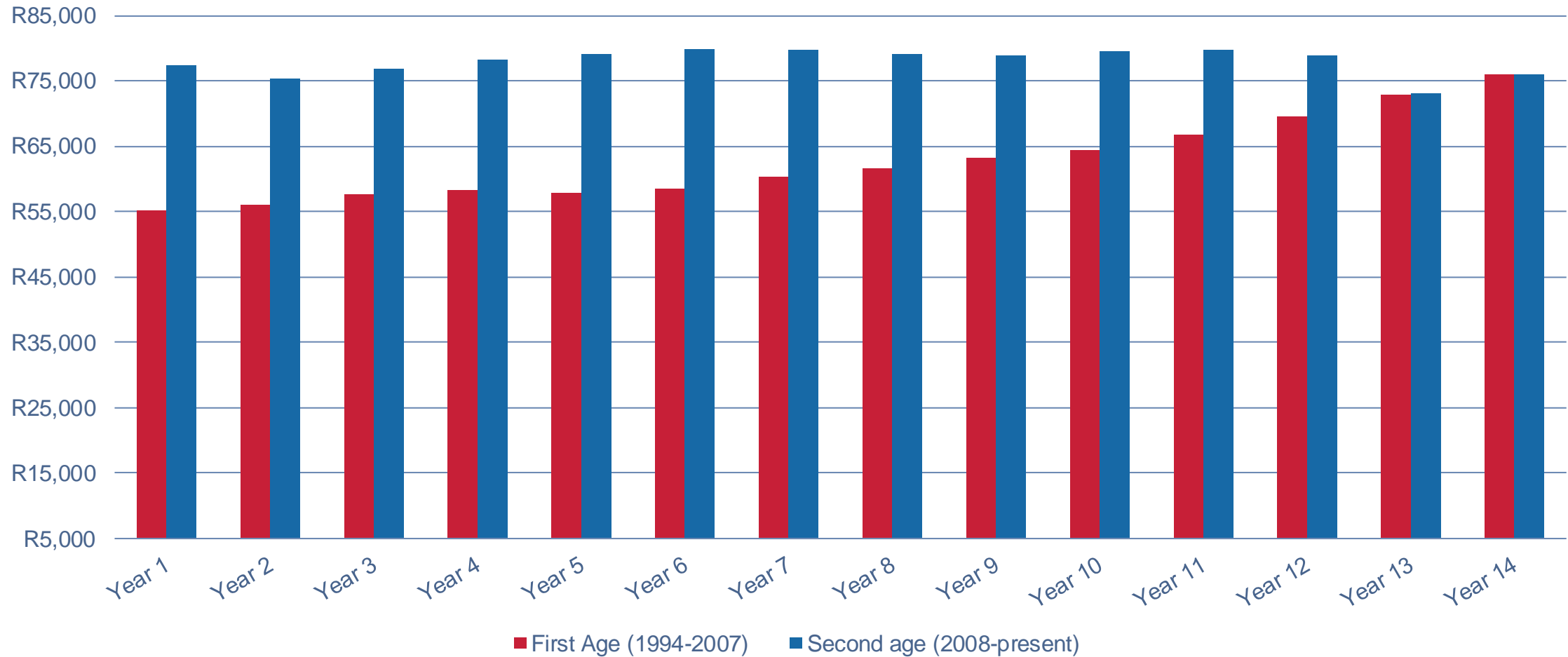
Real GDP growth for South Africa 1994-2024



Source: National Treasury, IMF

Live free. Prosper.

GDP per head for South Africa, constant ZAR 1994-2021



Source: World Bank (2023 data)

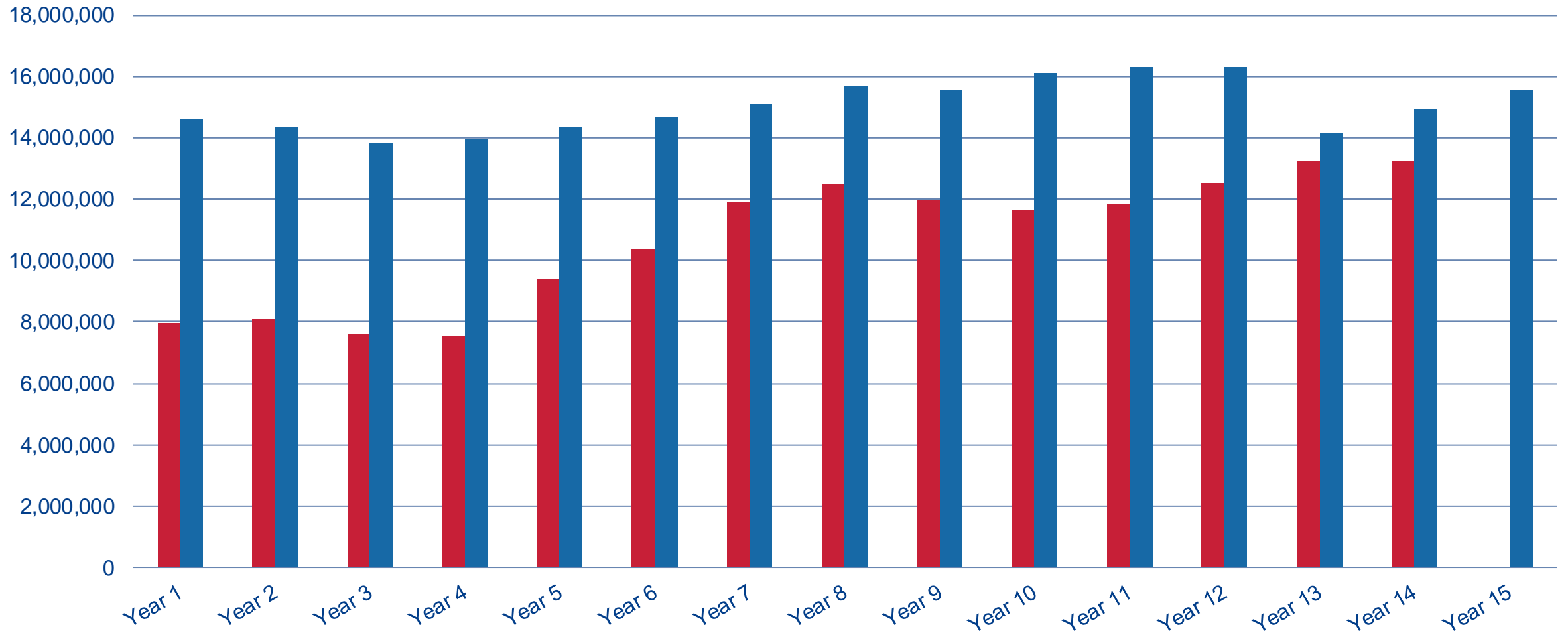
■ First Age (1994-2007)

■ Second age (2008-present)

+R20,700

-R1,620

Number of people employed 1994-2022



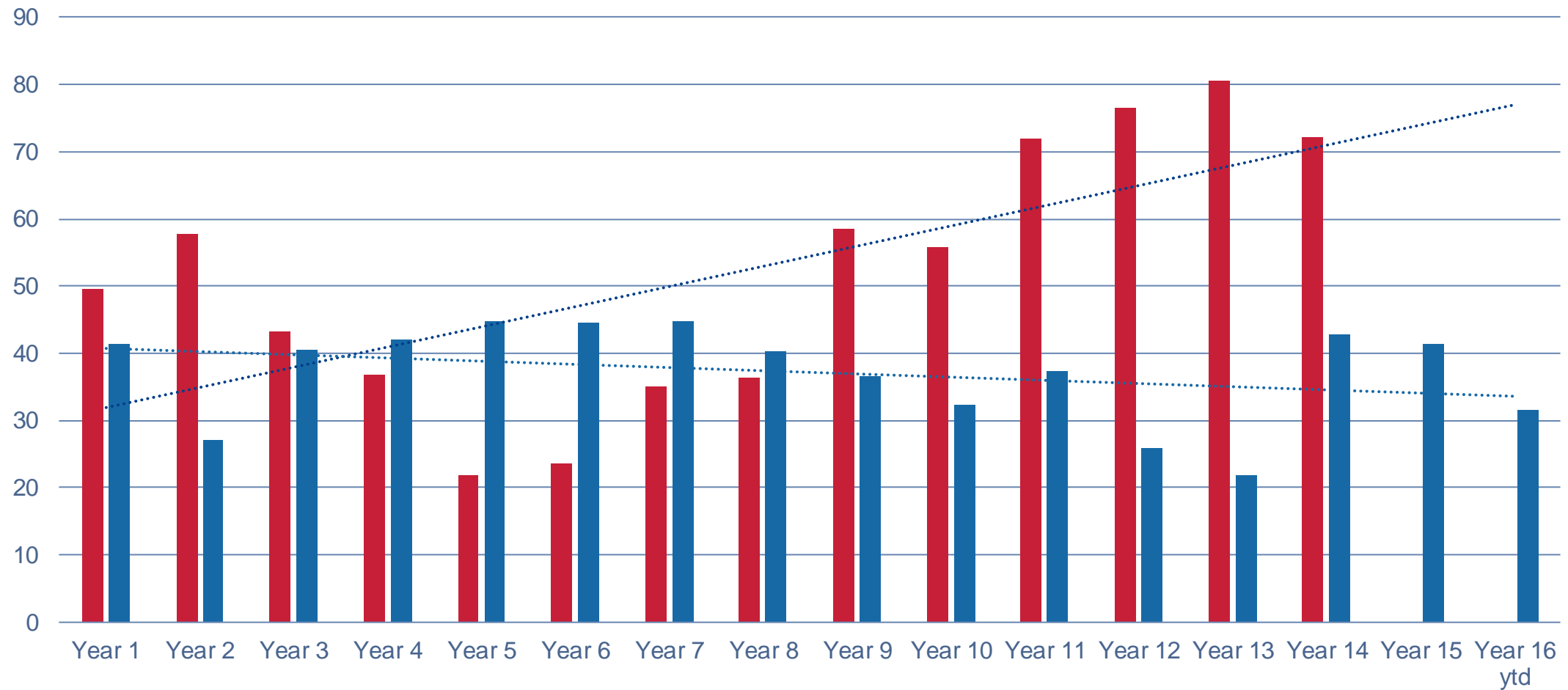
Source: Stats SA

Live free. Prosper.

■ First Age (1994-2007)
+5.3m

■ Second age (2008-present)
+0.9m

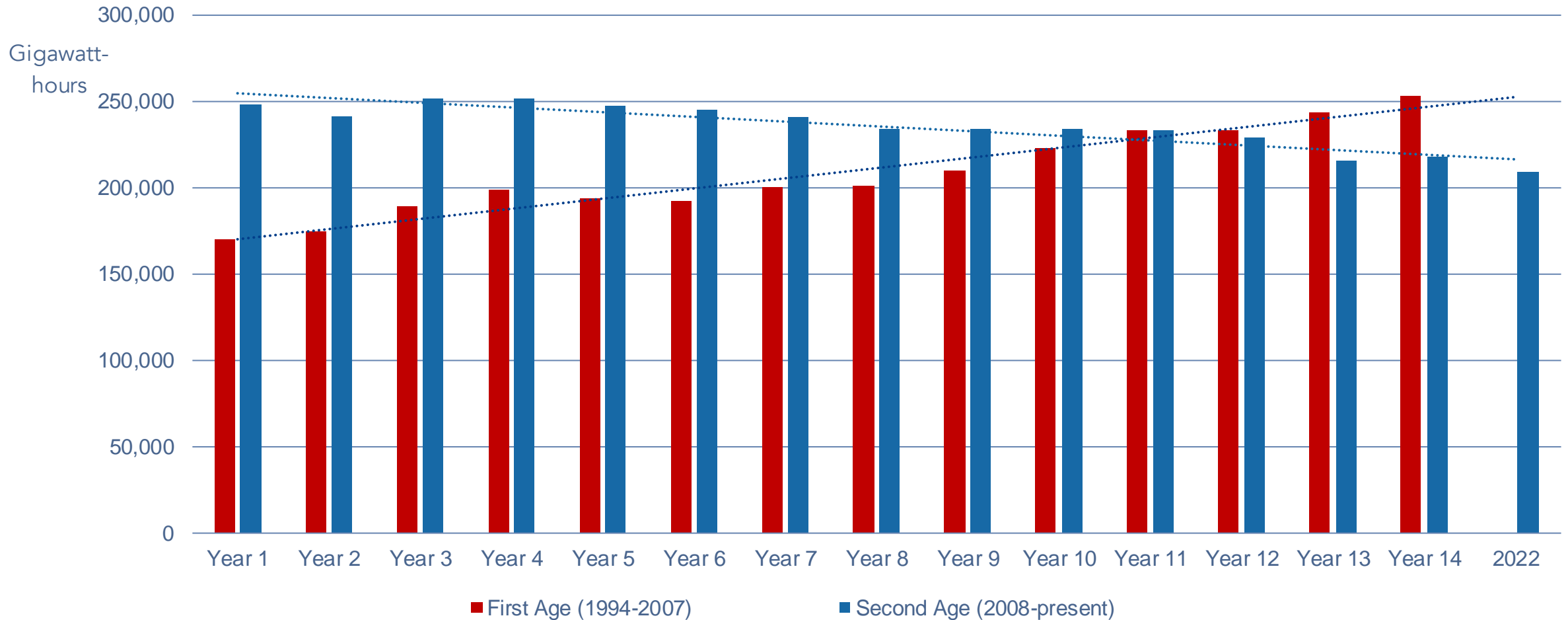
RMB/BER business confidence index, 1994-2023



Source: Bureau for Economic Research

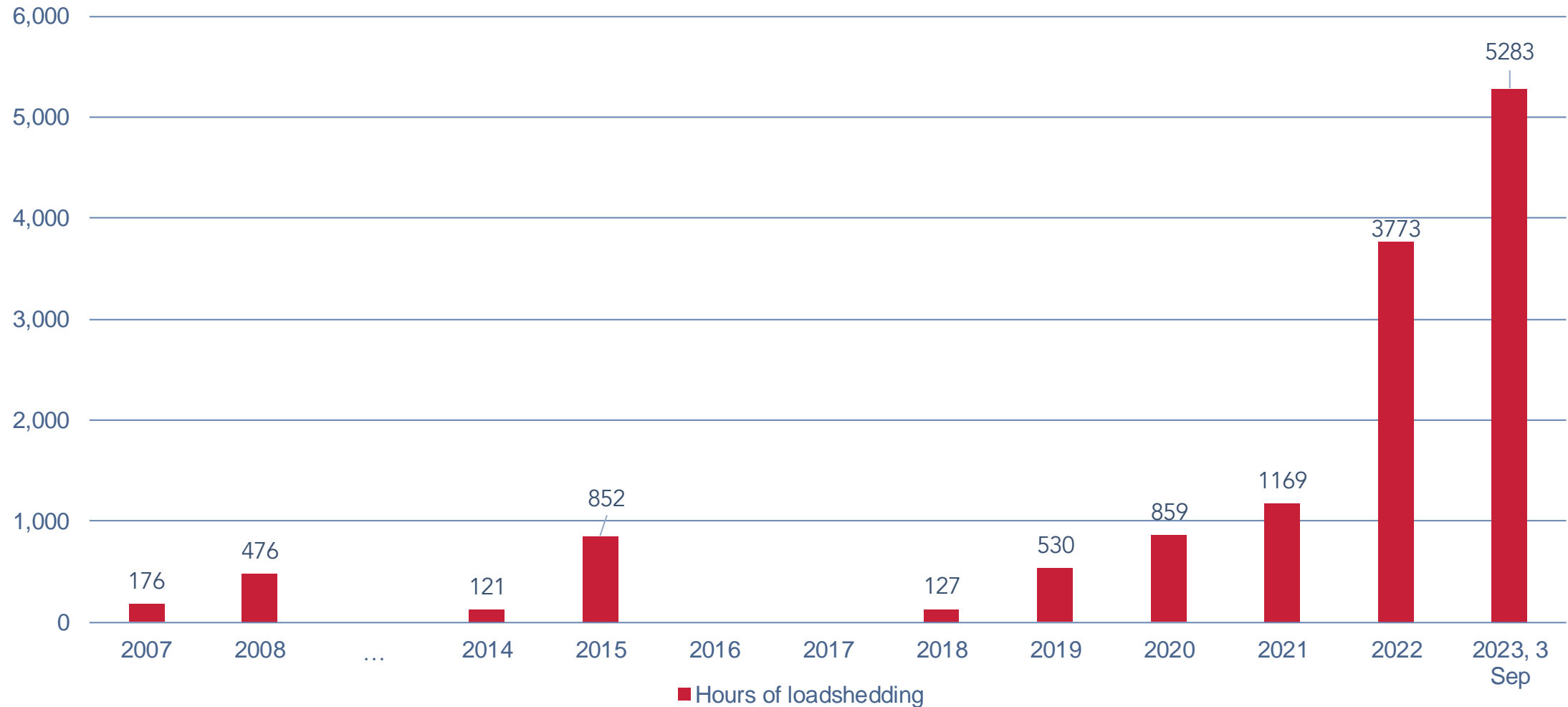
■ First Age (1994-2007) ■ Second age (2008-present)

Total electricity produced by Eskom per year (GWh)



Source: StatsSA; totals include electricity produced for export and for consumption in power stations and auxiliary systems

Loadshedding, duration of outages (hours)

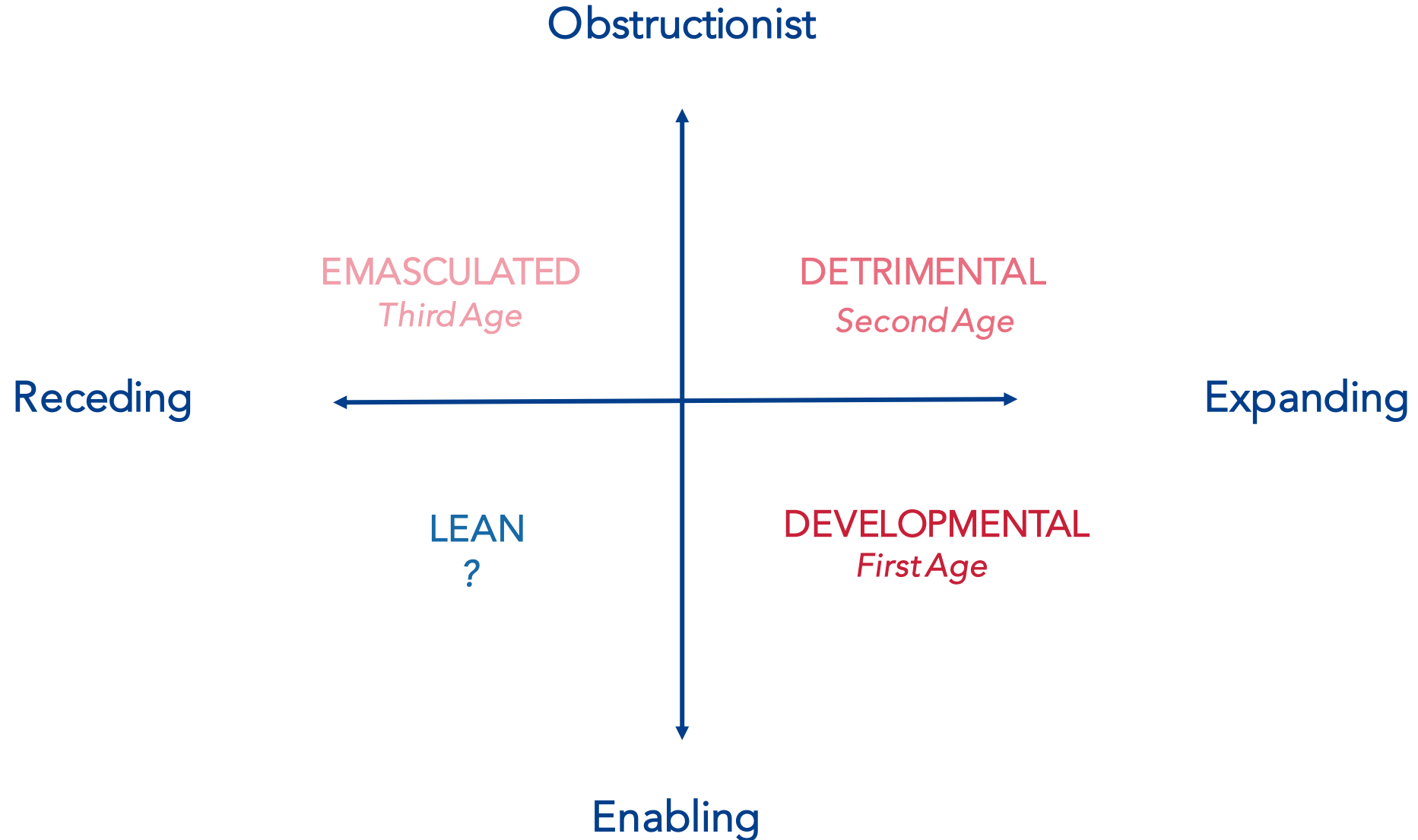


Source: CSIR/Pieter Jordaan. There are 8760 hours in a year. The week ending 4 Sep 2022 was the last full week without loadshedding.

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What lies ahead

The Role of the State



THANK YOU



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Mr Tur-Tur



A 'Schreinriese'



Examples of the emasculated state

- Local government elections 2021
 - July riots in 2021
 - eTolls
 - Astral Foods pipeline
 - Outsurance pointsmen
 - Discovery and Dial Direct pothole brigade
 - Residents' associations
 - LEAP programme in the Western Cape
 - Solidarity university
 - Taxi negotiations during Covid
 - Fire Ops
 - Private security companies
 - Private healthcare
 - Private electricity
 - Private road maintenance
 - Foreign relations
-
- JRA memo about potholes
 - Low-cost medical schemes
 - Training of nurses
 - Mafube / Frankfort electricity