

DEVELOPMENT  
INDICATORS  
REPORT  
**2024**



**HIGH-LEVEL  
SUMMARY  
BOOKLET:**

**JUNE 2025**



**the dpme**

Department:  
Planning, Monitoring and Evaluation  
REPUBLIC OF SOUTH AFRICA





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# Overview

This booklet provides a high-level summary of findings and insights from the Development Indicators (DI) 2024 Report. The Development Indicators (DI) series tracks South Africa's progress toward achieving the National Development Plan (NDP) Vision 2030 goals. It uses a consistent and standardised framework of key statistical indicators aligned with the NDP and the priorities of successive five-year government administrations.


The Department of Planning, Monitoring and Evaluation (DPME) coordinates the production of the DI report annually to provides a strategic evaluation of the country's development trajectory and the impact of public policies.

First published in 2007, the DI report is supported by a digital dataset with time series data extending back to 1994. The DI 2024 presents trends up to the year 2024. Timing of the DI 2024 enables it to serve as both a baseline for the 2024-2029 MTDP and a close-out assessment for the 2019-2024 Medium-Term Strategic Framework (6th Administration).

The structure of the report aligns with the three MTDP Strategic Priorities, which are: Inclusive growth and job creation; Reducing poverty & tackling the high cost of living and Building a capable, ethical & developmental state. The report and its associated datasets are publicly available as a resource for research, analysis and policy development. Its greatest value lies in consolidating a diverse range of quantitative data into an accessible and user-friendly format.

# Methodology

- 1.** The DI 2024 report has introduced some new aspects. The indicator themes have been refined to reflect the language of the 2024–2029 MTDP. They are now grouped under the three strategic priorities of the MTDP, and the indicator framework has been reorganised accordingly while ensuring consistency to monitor progress toward NDP Vision 2030.
- 2.** The set of indicators is regularly reviewed and updated. New indicators are added, and outdated ones are suspended or discontinued if they become irrelevant or lack reliable data. For instance, poverty and inequality indicators, currently outdated, will be reintroduced once new data becomes available.
- 3.** Indicators are selected based on the following criteria: An indicator must have a defined goal, track progress against NDP Vision 2030 and five-year priorities, reflect the current public discourse, and be supported by clear baselines, numerical targets and verifiable data sources. The process for selecting indicators also ensures alignment with international frameworks such as the United Nations Sustainable Development Goals (SDGs) and the African Union Agenda 2063, with Statistics South Africa's Integrated Indicator Framework (IIF) serving as a key reference.
- 4.** The analysis adopts a systems approach, recognising the complexity of societal change, evolving policy contexts, global shifts and major disruptions such as Covid-19. A strong citizen-focus remains central to this perspective.



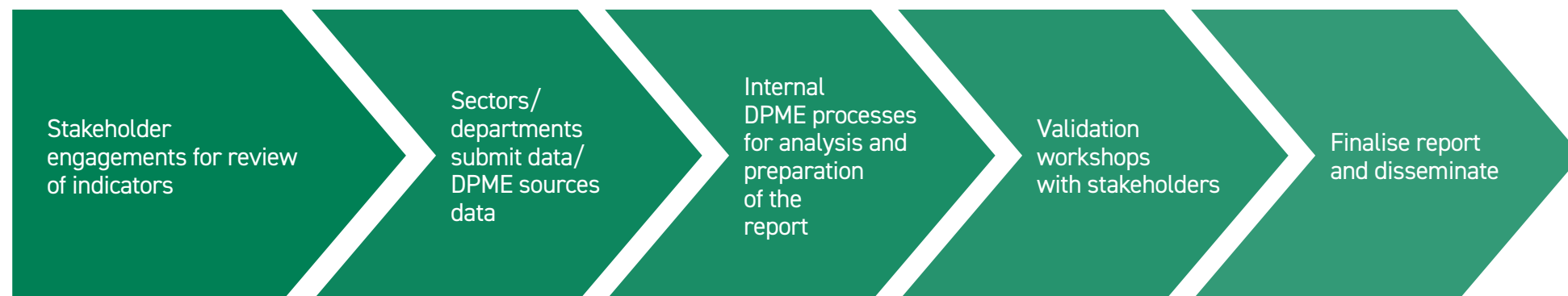
*An indicator must have a defined goal, track progress against NDP Vision 2030 and five-year priorities, reflect the current public discourse, and be supported by clear baselines, numerical targets and verifiable data sources.*

5. Data sources include government administrative databases, official statistics, and research from both local and international institutions. Quality assurance involved validation with data providers, and any dataset with unresolved quality concerns is excluded.
6. To enhance accessibility and data use, an interactive online Development Indicators Dashboard was launched in 2022 and is hosted on the National Policy Data Observatory (NPDO) – a collaborative platform involving the Department of Science,

Technology and Innovation (DSTI), the Council for Scientific and Industrial Research (CSIR), Statistics South Africa (Stats SA), the South African Revenue Service, the DPME, the National Planning Commission (NPC), and others. The dashboard provides disaggregated data (e.g., by province, gender, age, and sector) and interactive functionalities for users.

Public access is available at: <https://development-indicators.csir.co.za> Username: guest | Password: P@ssw0rd1234.

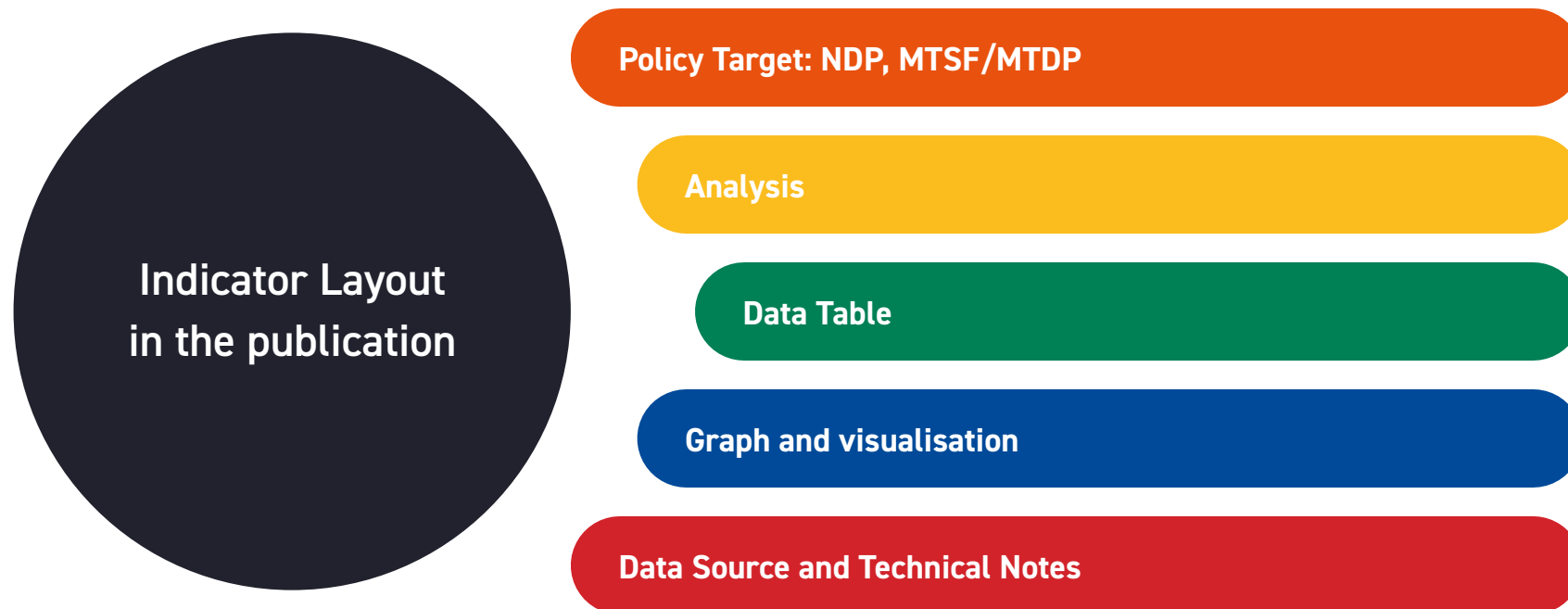
## Standard Process



# Alignment with the MTDP and the SDGs

MTDP Strategic Priorities	Development Indicators 2024 thematic areas	Sustainable Development Goals (Abbreviated)
<b>Strategic Priority 1: Inclusive growth and job creation</b>	A dynamic, growing economy	Goal 8: Decent work and economic growth
	Employment	Goal 8: Decent work and economic growth
	Infrastructure development and industrialisation	Goal 9: Industry, innovation and infrastructure; Goal 7: Affordable and clean energy
	Transforming the economy	Goal 8: Decent work and economic growth; Goal 5: Gender equality
	Innovation	Goal 8: Decent work and economic growth
	Positioning South Africa in the World	Goal 10: Reduced inequalities; Goal 13: Climate action; Goal 17: Partnerships for the goals
	Environmental sustainability	Goal 13: Climate action; Goal 12: Responsible consumption and production; Goal 14: Life below water; Goal 15: Life on land; Goal 6: Clean water and sanitation; Goal 11: Sustainable cities and communities
<b>Strategic Priority 2: Reduce Poverty and tackle the high cost of living</b>	A more equal society where no one is left behind	Goal 1: No poverty; Goal 2: Zero hunger; Goal 5: Gender equality
	Education and training	Goal 4: Quality education
	Health	Goal 3: Good health and well-being
	Social Cohesion and nation building	Goal 11: Sustainable cities and communities
<b>Strategic Priority 3: Build a capable, ethical and developmental state</b>	Good Governance	Goal 17: Partnerships for the goals
	A capable state delivering basic services to all citizens	Goal 7: Affordable and clean energy; Goal 10: Reduced inequalities; Goal 11: Sustainable cities and communities
	A safe and secure environment	Goal 16: Peace, justice and strong institutions

# Layout and style used for each indicator in the report





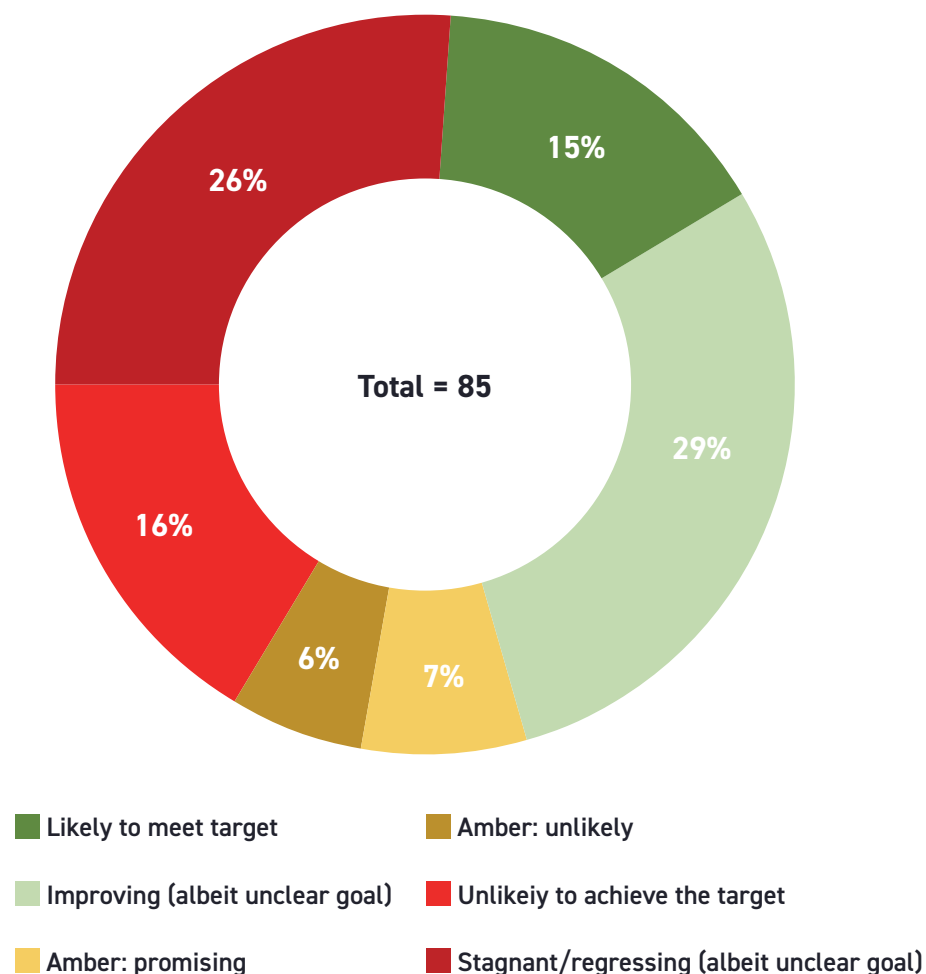
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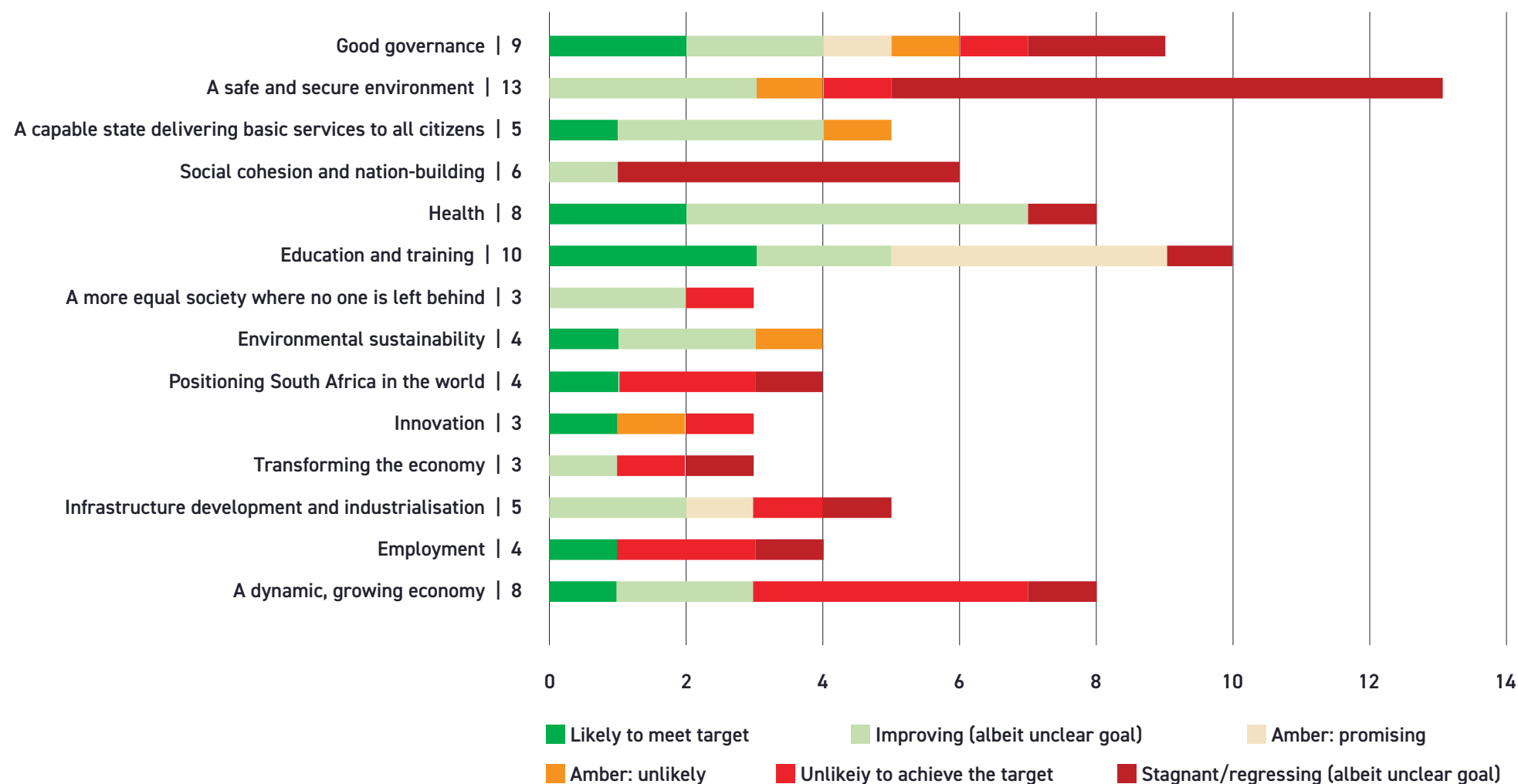
**KEY FINDINGS  
AND INSIGHTS  
BASED ON  
SELECTED  
INDICATORS**

# Assessment of NDP progress based on DI 2024 Report

- While the NDP remains South Africa's long-term plan, the key assumptions that informed its adoption in 2012 have since shifted including demographic changes, impact of COVID-19 pandemic and wider global disruptions.
- None of the NDP high-level indicators are currently on track to meet the 2030 goals:
  - **Poverty:** Reduce lower-bound poverty rate from 36.4% (2012) to zero.
  - **Inequality:** Lower the Gini coefficient from 0.69 to 0.60.
  - **Unemployment:** Reduce from 24.9% to 6%.
  - These goals assumed sustained **economic growth** of 5.4% annually from 2012.
- Of the 85 assessed DI 2024 indicators:
  - 13 (15%) are on track to meet their targets by 2030;
  - 31 (36%) show promising progress; and
  - 41 (48%) are unlikely to meet their 2030 targets.



# Assessment of NDP progress based on DI 2024 Report



# Strategic Priority 1: Inclusive growth and job creation

## Selected indicators:

### A dynamic, growing economy

- Gross domestic product
- Investment
- South Africa's competitiveness outlook

### Employment

- Employment and unemployment
- Work opportunities through public employment programmes

### Transforming the economy

- Competitive and accessible markets
- Land reform
- Black and female managers

### Infrastructure development and industrialisation

- Infrastructure funding and development
- Infrastructure for energy, road and rail, ports and water security

### Positioning South Africa in the world

- International relations and economic diplomacy
- Foreign direct investment
- Tourism
- Export competitiveness

### Innovation

- Research and development
- Patents
- Telecommunications and digital transformation

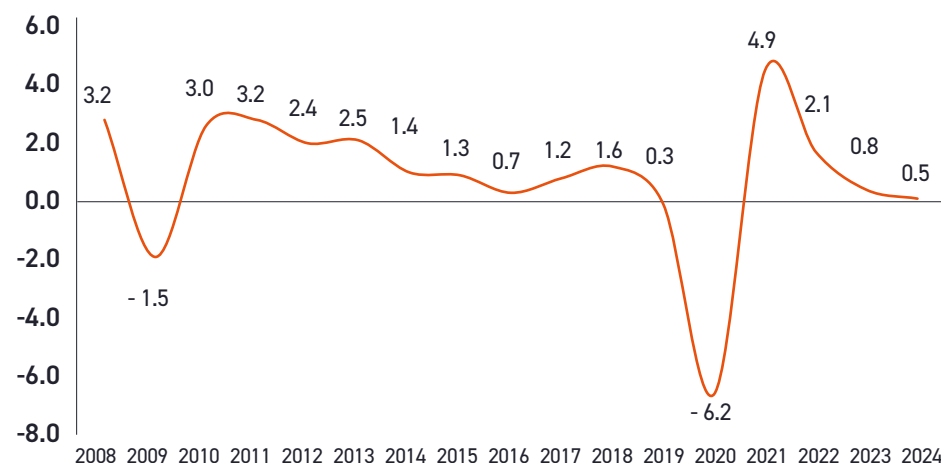
### Environmental sustainability

- Greenhouse gas emissions
- Air quality
- Marine and terrestrial biodiversity

# A dynamic, growing economy

## GDP growth rate (year-on-year)

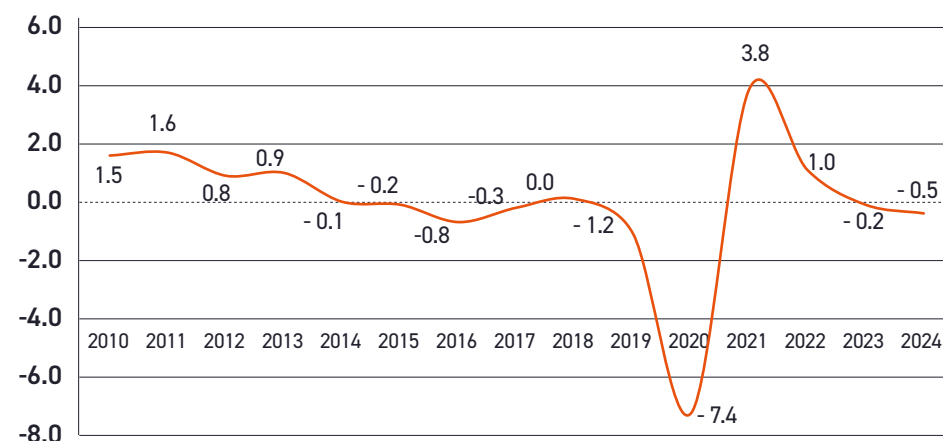
Goal: GDP growth of 5,4 percent



- South Africa's real GDP growth rate was 0.5% in 2024. Average GDP growth for the decade running is below NDP 2030's 5.4% target.
- 2024 growth drivers were finance, real estate and business services; personal services; and electricity, gas and water. Contracting in 2024 were agriculture, construction, trade, transport, manufacturing, and general government services industries.
- Medium-term forecasts show South Africa growing below global average. South Africa remains Africa's largest economy.
- The current strategy to turn-around the economy includes a focus on maintaining macroeconomic stability, implementation of structural reforms to unlock constraints for industrialisation, diversification, competitiveness and infrastructure development ; involvement of the private sector (SONA 2025).

## Real GDP per capita

Goal: Achieve an average GDP per capita of R110 500 by 2030; and grow GDP per capita income by 3 percent or more annually (NDP, 2012).

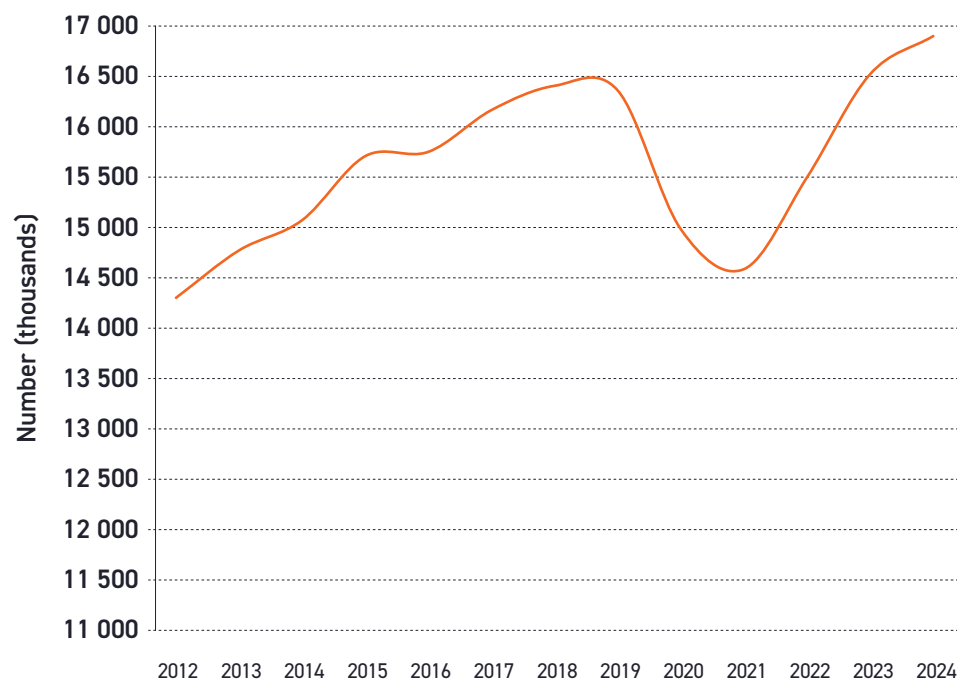


- GDP per capita in 2024 was R75,312 (\$5,747). It declined since 2014 as population growth as the population grew faster than GDP.
- The COVID-19 pandemic caused a severe contraction, with real GDP per capita growth plummeting to its lowest at -7,4% in 2020.
- This trend highlights the urgent need for policy reforms to promote economic growth that is both inclusive and improve income levels in South Africa

# Employment

**Goal: To increase employment to 24 million by 2030; Reduce unemployment rate to 6 percent by 2030**

Total employment, 2012 – 2024



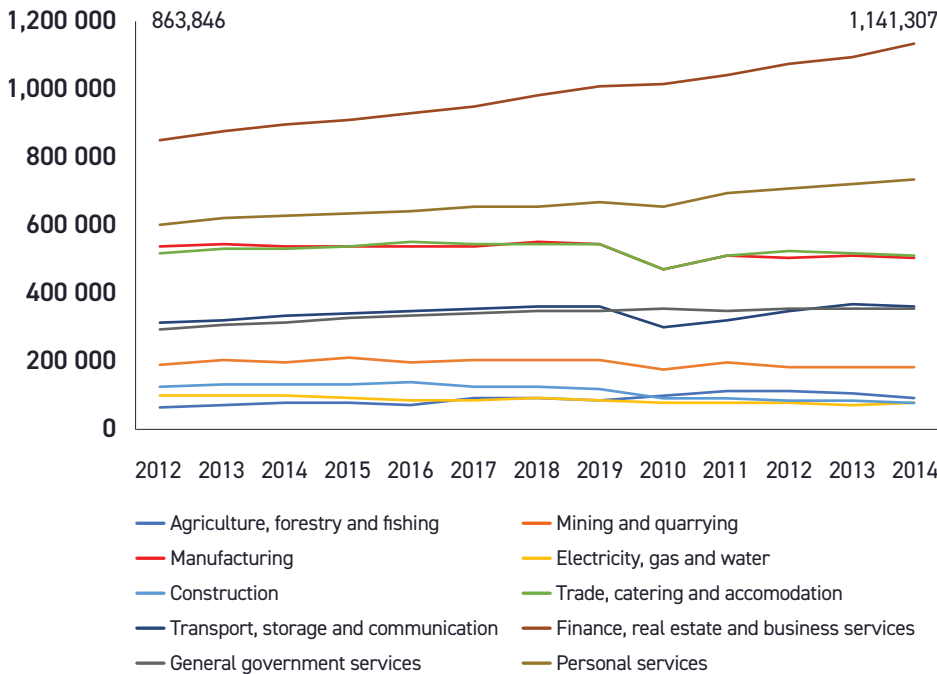
- Total employment reached 16.9 million in 2024, and increase of 354 000 from 16.5 million of 2023 – mainly due to formal sector growth.
- Employment growth has been insufficient to offset high unemployment (>25% since 2014) due to slow growth, skills mismatches and low labour market absorption capacity.
- Official unemployment rate was 32.6% in 2024, nearly unchanged from 32.4% in 2023, and slightly down from 33.5% in 2022. Expanded unemployment rate at 42.1% (2024).
- Youth Not in Employment, Education or Training (NEET) remains a critical concern, with 3.55 million youth (15–24) in 2024, up from 3.48 million in 2023.
- An ongoing review to enhance the effectiveness of existing public employment programmes is crucial, e.g. Expanded Public Works Programme (EPWP) and the Presidential Employment Stimulus (PES). In parallel, greater emphasis should be placed on strengthening policies that support private sector job creation and interventions to preserve existing jobs.

# Industrialisation

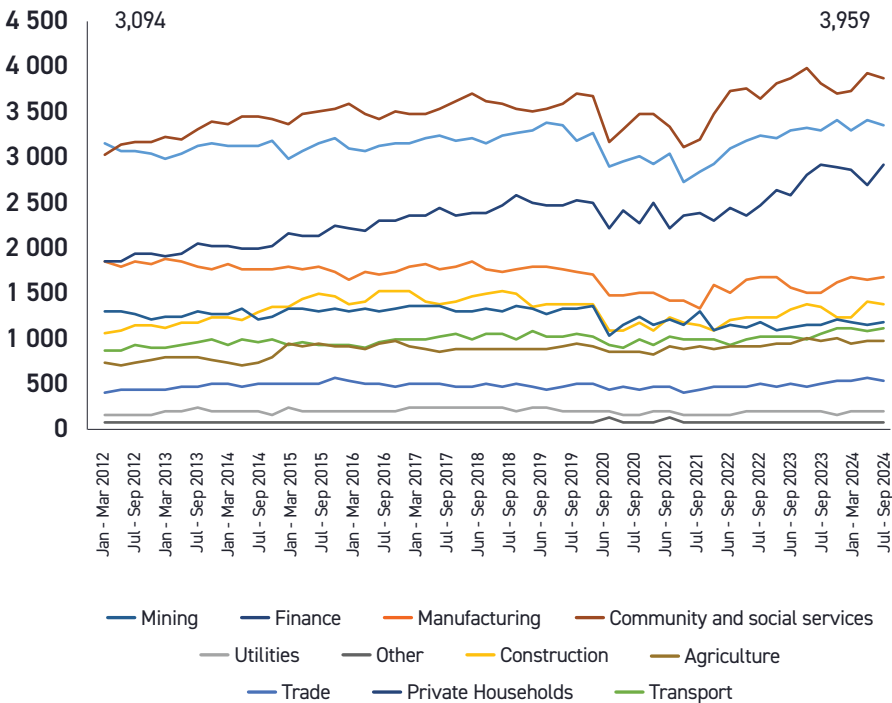
## Accelerated growth of industrial and labour-intensive sectors

Goal: Growth of priority sectors reaching R100 billion investment in manufacturing, R116 billion in trade, retail and tourism, and R13 billion in agriculture, forestry, and fishing.

GDP: Industry gross value added



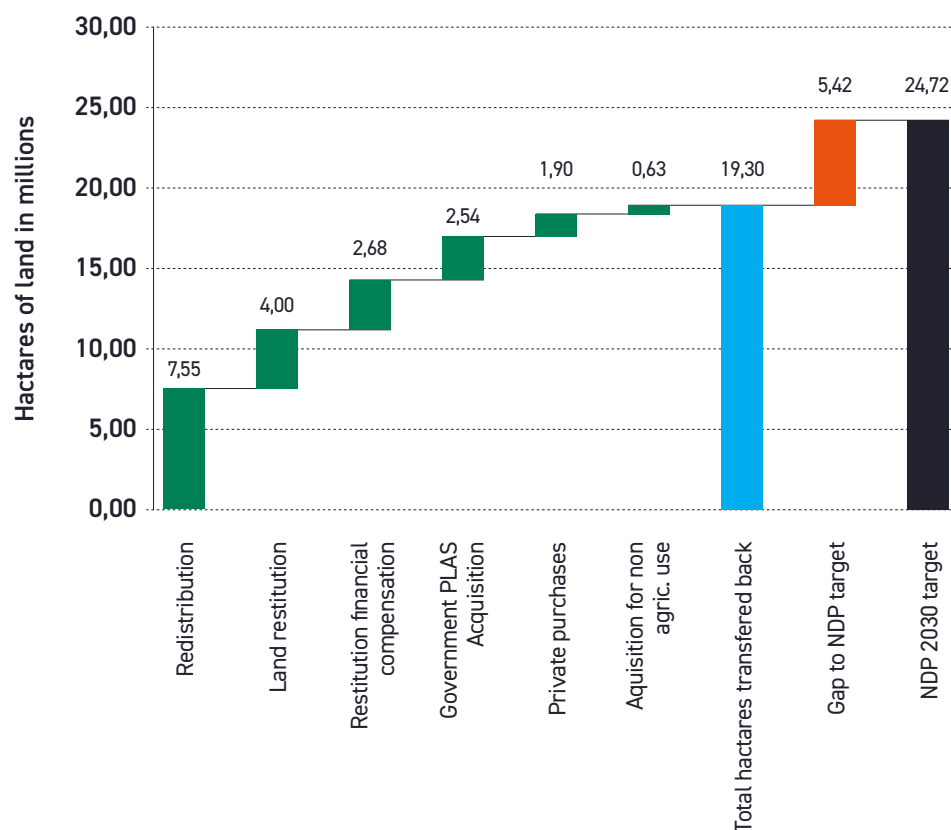
Employment contribution of different industries



# Transforming the economy

## Land Reform: Redistribution, tenure reform and restitution

Goal: Redistribution of 30% of agricultural land (equivalent to 24.6 million hectares) as redress to victims of apartheid-era land dispossession; To promote equitable land ownership and agricultural development (NDP 2012); Expanding equitable land ownership by women, youth and persons living with disability (MTDP 2024-2029).



- 19.3 million hectares transferred by Aug 2024 through various land reform interventions, accounting for 78.1% of the NDP target.
- Post-settlement land development remains a big challenge. Recent evaluations called for support for streamlining claims processes, greater smallholder farmers and SMMEs, better access to markets, and diversifying land use into tourism, housing and cultural preservation.

## Control of the economy

- Black ownership in JSE-listed companies is low: only 2% fully Black-owned and less than 25% with some Black-ownership. Fronting is a major challenge. Over 500 B-BBEE agreements worth R600 billion reported since 2017.
- SA economy remains highly concentrated, with 69.5% of sectors dominated by a few firms. In 2016, the top 10% of firms controlled 85.6% of turnover, while the bottom 50% (mainly SMMEs) contributed just 1.6%.

## Workforce

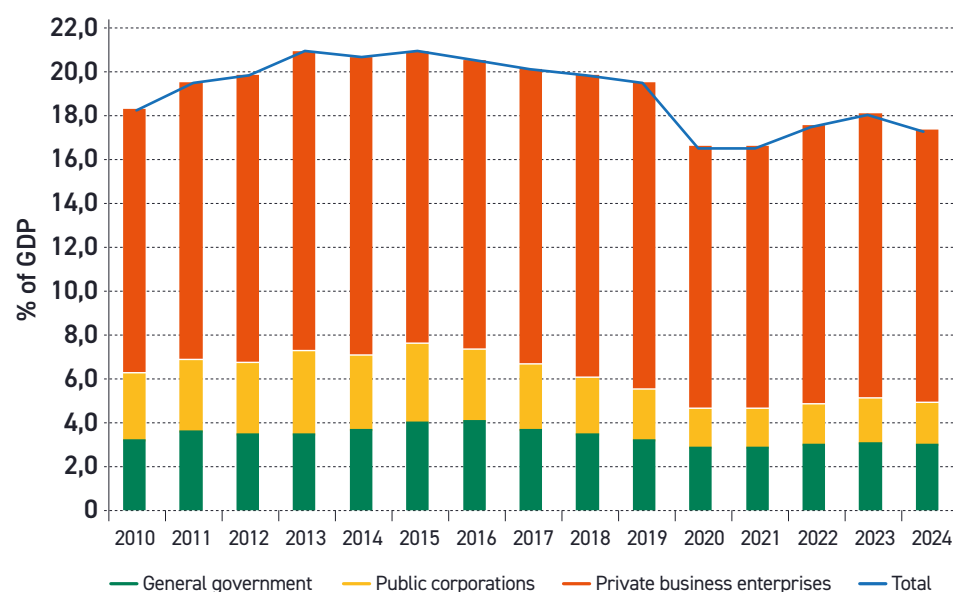
- Workforce transformation shows long-term shifts, with Black representation at 34.9% in top management and 48.5% in senior roles (2023).
- Female representation also improved to 26.9% in top management and 37.7% in senior management



# Investment and infrastructure development

## Investment

Goal: Increase Gross Fixed Capital Formation (GFCF) as percentage of GDP, to 30% by 2030; where about 1/3 comprises public sector and 2/3 comprises private sector investment (NDP, 2012).



- GFCF stood at 17.1% of GDP in 2024, still below the 30% NDP 2030 target. This was a minor decline from 17.8% in 2023, driven by contributions from general government, public corporations and private enterprises.
- Real GFCF declined from R688 billion (2023) to R661 billion (2024)
- GFCF remains below historical peaks of 20.6% of GDP in 2013 and 20.6% of GDP in 2015.
- Structural reforms (through Operation Vulindlela) and improved state capacity in infrastructure development are essential for driving investment, private sector participation, industrialisation and competitiveness. FDI investment facilitation must leverage existing international relations.

## Public sector infrastructure spend

Goal: Increase public sector infrastructure spend to 10% of GDP by 2030 (NDP, 2012); Increased infrastructure investment, access and efficiency; Proportion of municipalities spending at least 85% of their annual infrastructure funding (MTDP 2024-2029).

Institution type	Actual spending			Revised estimates	MTEF budget allocations			MTEF totals	% per inst. type
	20/21	20/21	20/21		20/21	20/21	20/21		
State-Owned Companies	50,8	53,4	68,0	95,7	112,9	134,2	127,7	374,8	39,7%
Local government	55,6	62,1	64,7	68,4	67,9	71,3	74,5	213,7	22,6%
Provincial departments	51,8	57,7	60,1	63,9	63,4	60,0	60,4	183,8	19,5%
Public entities	8,8	20,2	26,8	29,8	32,7	37,4	41,3	111,4	11,8%
National departments	11,4	12,5	13,2	16,5	14,3	13,0	13,8	41,1	4,4%
Public-private partnerships	4,9	6,5	6,0	6,3	6,3	6,4	6,4	19,1	2,0%
Total	183,4	212,3	238,8	280,7	297,5	322,2	324,1	943,9	100,0%

- The government committed R943.8 billion to public infrastructure investment over 2024-2027: 40% for SOEs, 23% municipalities, 19% provincial governments, and the remainder to national department, public entities and public-private partnerships.
- This is a public commitment towards new infrastructure build and upgrade and maintenance of existing infrastructure.
- Public-sector infrastructure spending stood at 3.8% of GDP in 2021, which is below the NDP target of 10% by 2030.
- Of the R3 trillion in projects gazetted since 2020 under Strategic Integrated Projects (SIP), 13 have been completed, and 82 are under implementation until 2029. Monitoring of the investment pipeline is crucial.

# Investment and infrastructure development

## Infrastructure for water security

Goal: Completion of bulk raw water infrastructure projects. Improved Regulation of water supply (Blue drop indicator), water use efficiency (No drop indicator), and wastewater effluent (Green drop indicator).

Several bulk water infrastructure projects under the SIP portfolio are progressing, including:

- Lesotho Highlands Water Project (Phase II) – Expanding water supply from Lesotho to Gauteng (from 780 million m³/year to 1,260 million m³/year).
- Mokolo-Crocodile River Project (MCWAP-2) – Expanding water supply to Lephalale.
- uMkhomazi Water Project – Constructing an 81-meter-high dam at Smithfield to improve water supply for eThekweni and surrounding areas.
- Other key projects: Tzaneen Dam (Mopani District), Clanwilliam Dam (Cederberg, West Coast), Coerney Dam (Nelson Mandela Bay), Mzimvubu Dam (Eastern Cape), and Berg River Voëlvlei Augmentation Scheme (Cape Town).

### Water quality and efficiency regulation:

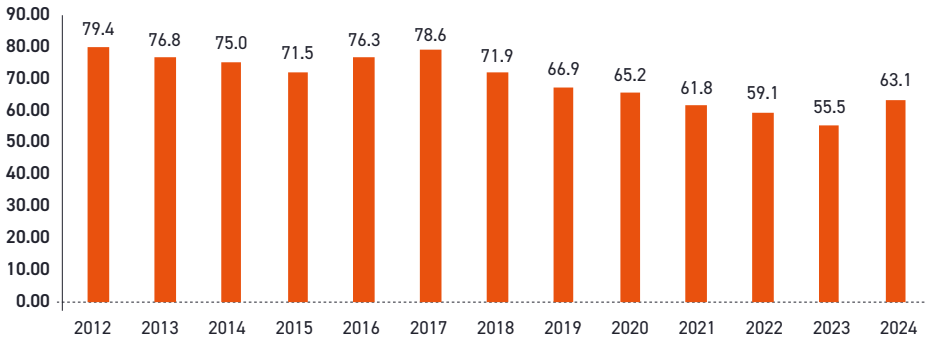
- Water supply performance declined, with only 2.7% of systems achieving Blue Drop certification in 2023, down from 4.6% in 2014. Wastewater treatment performance also worsened, with 34% of plants classified as critical-risk.

### Interventions for water sector reforms underway include:

- Establishment of a National Water Resources Infrastructure Agency (NWRIA) to oversee bulk water projects.
- Establishment of the Catchment Management Agencies (CMAs) to regulate water use.
- Amendment of the Water Services Act (WSA) to empower ministerial intervention in governance failures, untreated sewage spillages and water wastage.
- Expanding private-sector participation in wastewater treatment, non-revenue water, desalination and water reuse initiatives.

## Infrastructure for energy security

Goal: Achieve 80% Energy Availability Factor (EAF) (MTSF 2019-2024); Over 40,000 MW generation capacity added to the grid by 2030; 10280 KMs of transmission lines added by 2030, increasing to 14 218 by 2032 (NECOM Energy Action Plan, July 2023)



- Energy Action Plan was introduced in July 2021 as a crisis response to end loadshedding, achieve long-term energy security and drive reforms in the energy landscape. Risk of loadshedding reduced, with nearly 300 consecutive days without loadshedding by January 2025. By November 2024:
  - 7.6% improvement in Energy Availability Factor (EAF): From April 2024, it reached 63.1%, improving from 55.5% in the same period in 2023. EAF still to reach the 2012 level of 79.4%.
  - Transmission infrastructure expansion is underway, with 548 km of new transmission lines completed. 5,498 MW of the targeted 40,000 MW generation capacity installed;
  - 548 km of the planned 10,280 km transmission lines were completed.
  - Rooftop solar adoption grew significantly, reaching 6,141 MW, easing pressure on the grid.
  - The Electricity Regulation Act (ERA) introduced competition in the electricity market and to attract private sector investment in renewable energy.

# Investment and infrastructure development

## Road, rail and ports infrastructure

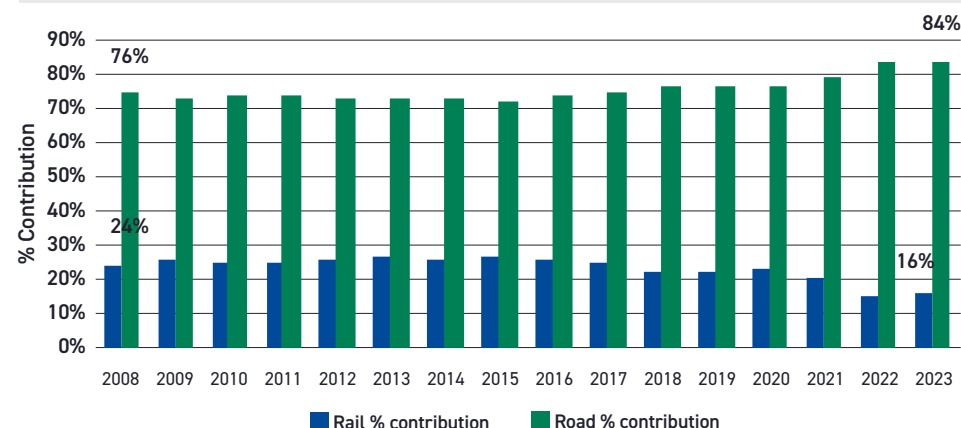
Goal: 10% of road freight transferred (payload and volume) from road to rail by 2024 (MTSF 2019-2024); Investment in transport infrastructure development, focusing on underserved areas (MTDP 2024-2029): Integrated Public Transport Networks (IPTNs) operating in 10 cities by 2029 (MTDP 2024-2029 Provincial percentage of population within 2km of an all-weather road (SDG 9.1.1).

- Road freight dominates freight transport in South Africa: In 2023, 84.3% of payload was transported by road, up from 76% in 2008, while rail's share declined to 16%. Road freight volumes rose from 688.3 million tons (2021) to 862.5 million tons (2023), while rail freight declined from 178.8 million tons to 160.4 million tons.
- On passenger transport: 65% of households rely on minibus taxis, followed by buses (23.6%) and trains (9.9%). Metrorail passenger volumes fell from 16.69 million (2021/22) to 15.6 million (2022/23), with 77.3% of trains on time. Bus Rapid Transit operates in major metros.
- Accessibility of road network: South Africa has 532,000 km of proclaimed roads, with 9,208 km of national highways. Gauteng (89.3%), Free State (66.1%), and Western Cape (65.7%) have the highest road access indices, while KwaZulu-Natal and Eastern Cape lag, with the 10 district municipalities with the lowest access to all-weather roads.
- In 2023, South Africa's major ports ranked among the lowest globally, with Cape Town at 405, Durban at 398, and Port Elizabeth at 391 out of 405 ports globally. SA's container volume flow (20 Foot Equivalent Unit - TEU) relative to the world shows a declining trend, from 0.8% in 2008 to 0.5% in 2023.

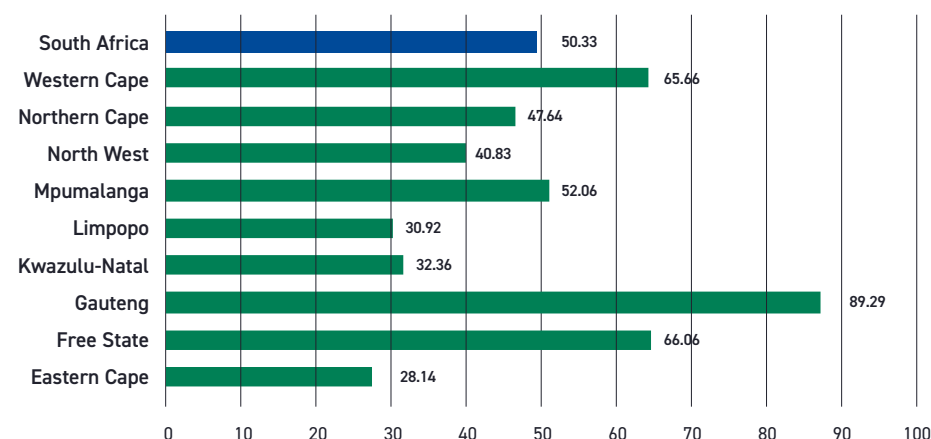
### Interventions underway include:

- Freight Logistics Roadmap to improve efficiency and increase private sector participation.
- PRASA Rail Corridor Recovery Programme restored 26 out of 40 closed rail lines by December 2023.
- Transfer of the primary road network to SANRAL for improved maintenance.
- Restructuring of Transnet.
- SIP projects include the Durban-Free State-Gauteng logistics corridor, OR Tambo aerotropolis, N2 Wild Coast Road, SANRAL bridges, and Boegoebaai Port and Rail Project and the revitalisation of existing small harbours.

Rail and Road Freight Volumes contributions to total, 2008-2023



% of population located within 2KM of all weather road



# Investment and infrastructure development

## Telecommunication and digital infrastructure

Goal: Universal internet access: Targeting 100% population connectivity (from 54% in 2019). Connectivity expansion: 90% of public schools connected by 2024; Affordable data costs: Rank among Africa's top 10 cheapest countries for mobile data (from 31st in 2018); Digital economy: Grow the digital platform economy's GDP contribution.

- In 2021, **41.19 million internet users** (68.2% of the population). Near universal mobile network coverage: 3G at 99.9%, 4G/LTE at 97.7%, 5G increased from 0.7% (2020) to 7.5% (2021) – 5G mostly in urban centres.
- **Global Rankings** show South Africa fixed broadband at 102nd (42.57 Mbps download, 338.45 Mbps upload); and Mobile broadband at 52nd (45.06 Mbps download, 7.95 Mbps upload). Global Innovation Index ranking indicates improved in ICT access from 86 (2014) to 70 (2023).
- **Digital Economy** is growing. In 2022, E-Commerce grew reached R55 billion, 4% of total retail market and 1.1% of GDP. Covid-19 has accelerated the adoption of e-platforms, digital retail, and social commerce.

### Reforms underway in the telecoms sector include:

- IMT Spectrum Auction (2022) boosted 5G and broadband expansion with obligations for digital inclusion (zero-rated access for public institutions).
- Mobile operators are transitioning from infrastructure ownership to digital service aggregation (focusing on towers, fibre, and data centres).
- Government digital transformation initiatives:
  - **SA Connect**, which aims to expand broadband infrastructure.
  - **Digital transformation of key government services** to improve accessibility and efficiency.
  - **MeerKAT and Square-Kilometre Array**, a global scale project for space and astronomy infrastructure.
  - **National Integrated Cyberinfrastructure System (NICIS)**, which supports high-performance computing through the Centre for High-Performance Computing, high-speed, high-bandwidth connectivity (SANReN) and Data curation for critical databases.

# Positioning South Africa in the world

## Foreign direct investment

Goal: Increase foreign direct investment to 10% of GDP by 2030 (NDP, 2012).

### Foreign Direct Investment:

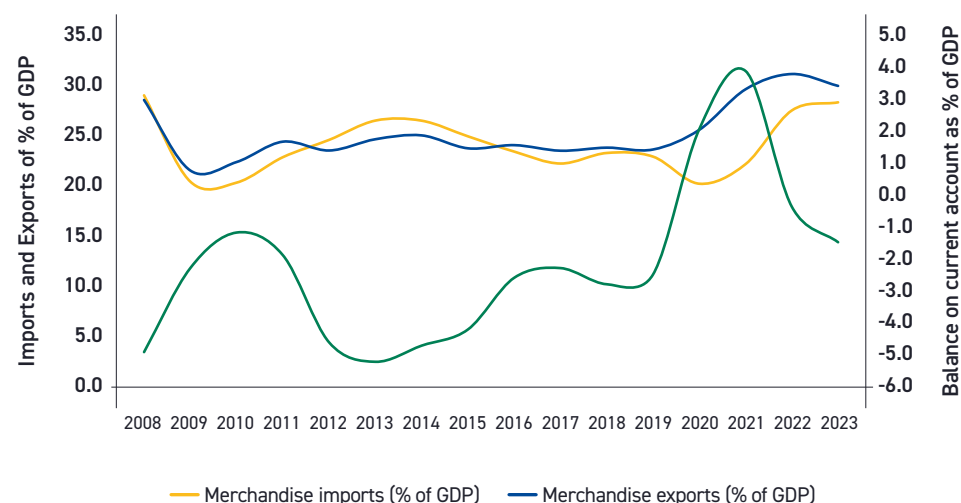
- In 2023, South Africa recorded Net Foreign Direct Investment (FDI) of R148.4 billion
- Over the long term, South Africa's FDI inflows have remained modest, exceeding 10% target of domestic investment only five times since 1994.
- The highest net FDI level was recorded in 2008 at R101.9 billion, largely related to the 2010 FIFA World Cup preparations, and the lowest net FDI level recorded in 2017, with net FDI falling to -R71.4 billion.

### International Trade:

- Merchandise exports increased by R23.8 billion (1.2%) in 2023.
- Manufacturing exports grew by 12.9%, and agriculture exports by 13.2%, but mining exports declined by 6.7%.
- China remains South Africa's largest trading partner, with exports rising from R59.1 billion in 2010 to R228.6 billion in 2023.
- The balance of payments showed a decline in merchandise exports and an increase in imports, narrowing South Africa's trade surplus and highlighting the need for manufacturing and export competitiveness.
- As an open economy, South Africa's trade and investment patterns have proven vulnerable to global disruptions, including the COVID-19 pandemic, economic crises and geopolitical tensions.

## Exports and balance of payments

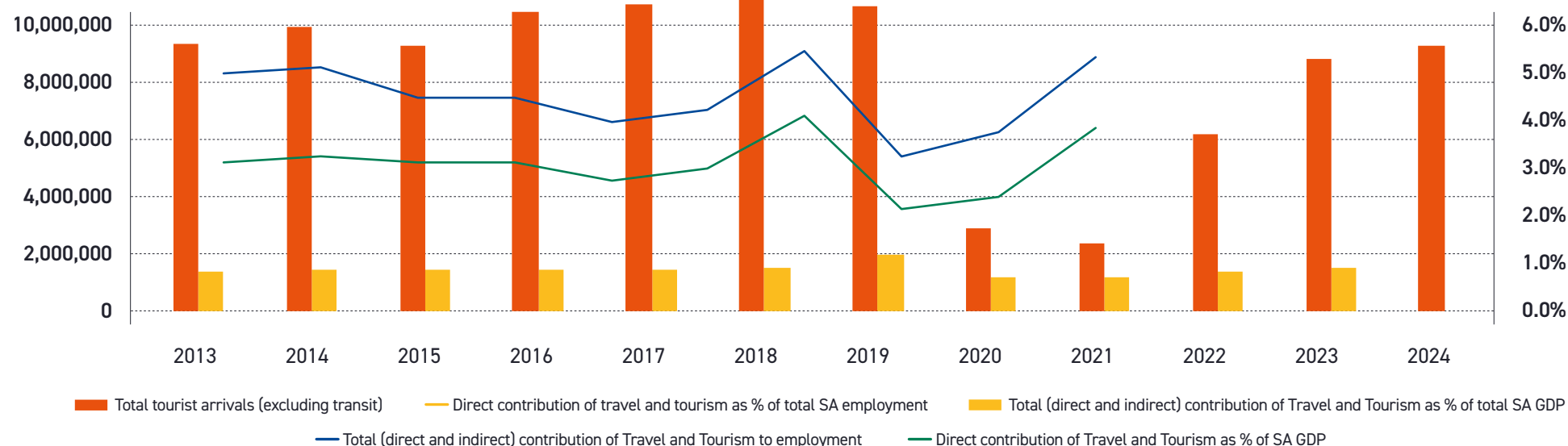
Goal: Increase exports by 6% a year; Increase the ratio of exports to GDP (NDP, 2012)



# Positioning South Africa in the world

## Tourism development

Goal: Increase international tourist arrivals into South Africa to 14,95 million by 2030; Increase tourism to 10% of GDP by 2030 (NDP, 2012)

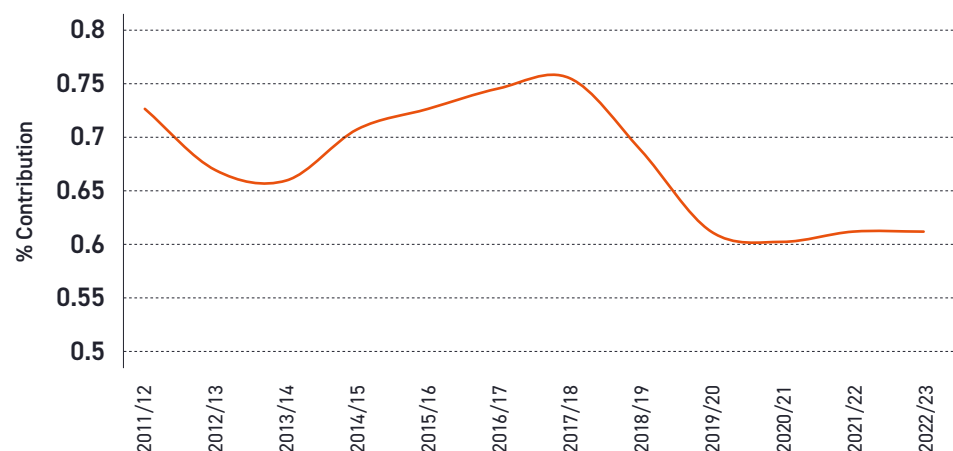


- Total Tourist Arrivals (2024): 8.9 million – Strong recovery from 2.8 million (2020) but still below the pre-Covid level of 10.5 million in 2018
- Tourism sector contribution to GDP stood at 3.5% in 2022 (up from 2.3% in 2021), but was still below 3.7% achieved in 2019.
- Tourism's share of total employment rose to 4.7% in 2022, compared to 3.4% in 2021. Tourism contribution to employment in 2022 was 733,385 jobs (+48.9% from 2021) but below pre-pandemic peak (777,686 in 2019).
- SONA 2025 announced reiterated interventions for visa reforms, increasing the number of flights to key destinations, and through marketing South Africa as the best country to visit.

# Innovation

## GROSS EXPENDITURE ON RESEARCH AND DEVELOPMENT(GERD)

Goal: To achieve R&D expenditure of 1.1 percent by 2024/25 and 1.5 percent by 2030/31 (MTDP 2024-2029)



- While GERD increased steadily from R22.2 billion in 2011/12 to R40.9 billion in 2022/23, it remained below the target of 1.5% of GDP.
- GERD/ GDP ratio stood at 0.61% in 2022/23 and has remained at around the same level since 2019/20. Over the past decade, it peaked at 0.75% in 2016/17.
- Researchers per 1,000 in Employment stood at 1.7 in 2022/23 – a decline of 0.2 percentage points from 1.9 in 2021/22. Over a decade, this ratio grew from 1.5 in 2011/12 to its peak in 2021/22.

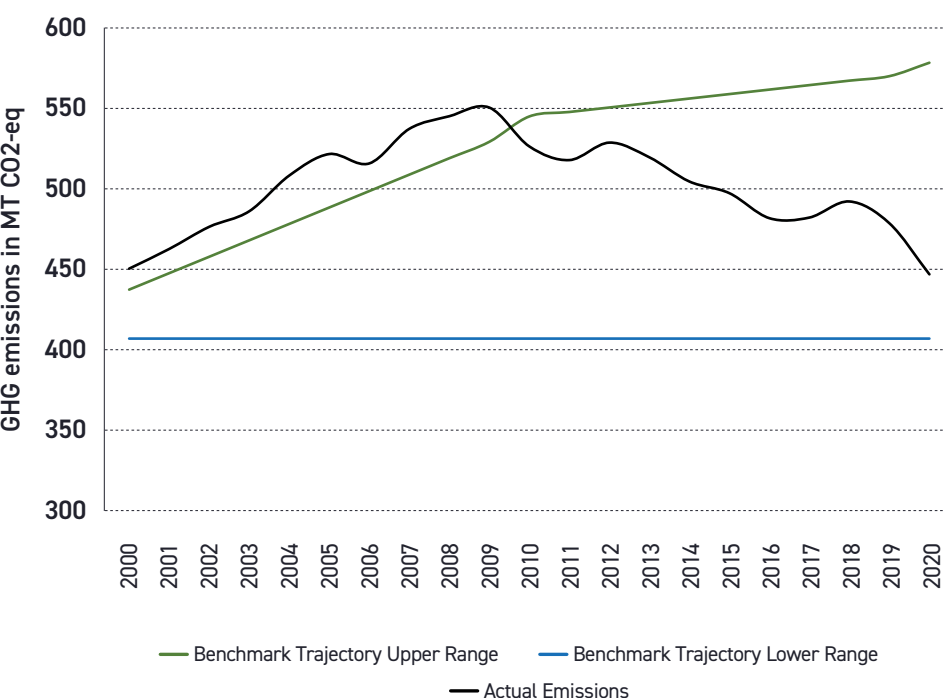
## PATENTS

- Patents reflects a country's technological innovation effort, alongside other measures such as industrial designs, trademarks, plant breeders' rights and technology-driven entrepreneurship/ start-ups. South African inventors file patent applications both domestically—at the South African Patents Office—and internationally.
- South Africa's international patent applications declined from around 800 annually between 2008 and 2010 to between 400 and 600 since 2011. This decline reflects ongoing constraints in R&D commercialisation and broader economic challenges.
- Despite this, the South African Patents Office saw growth in domestic activity, receiving 13,976 applications in 2022, up from 10,960 in 2021. Over 90% of these were filed by non-residents, with roughly one-third originating from China.
- Public institutions such as University of Cape Town, Stellenbosch University, the University of the Witwatersrand, the Council for Scientific and Industrial Research (CSIR), alongside private sector actors are active contributors to the national system of innovation—particularly in fields such as energy, green technology, mining, biotechnology and medical technologies.
- The WIPO Indicators 2024 report ranks the South African Patents Office among the top 20 globally. While South Africa performs well regionally and among developing nations, it continues to lag behind advanced economies that have larger innovation hubs and key markets where protection is most sought.

# Environmental Sustainability

## National greenhouse gas emissions trajectory range

Goal: Reduce greenhouse gas (GHG) emissions, and maintain within 398 and 510 Mt CO<sub>2</sub>-e range in line with the revised National Determined Contribution Target for the period 2021 to 2025 (MTDP 2024-2029)



- There are improvements as South Africa's greenhouse gas (GHG) emissions declined by 48 Mt CO<sub>2</sub>-eq (9.8%) from 490 Mt CO<sub>2</sub>-eq in 2018 to 442 Mt CO<sub>2</sub>-eq in 2020.
- The graph shows that, since 2010, South Africa's GHG emissions have remained within the national GHG emissions trajectory range despite the growth in the carbon intense economic sectors.
- However, over the longer term, emissions have only decreased by 0.9% — from 446 Mt CO<sub>2</sub>-eq in 2000 to 442 Mt CO<sub>2</sub>-eq in 2020, owing to increasing GHG trend in the period 2001-2009.
- This progress signals efficiency of climate change mitigation measures implemented across various sectors — including renewable energy generation, energy efficiency and the green transport.
- Marine Protected Areas (MPAs) has expanded to cover 5.38% of South Africa's Exclusive Economic Zone (EEZ) since 2019.
- However, Air Quality remains a concern in industrial regions such as the Vaal Triangle and the Highveld Priority Area.



# Strategic Priority 2: Reduce poverty and tackle the high cost of living

## Selected indicators:

### A more equal society where no one is left behind

- Food poverty lines
- Social-assistance support
- Inclusion of persons living with disabilities

### Education and training

- Early childhood development
- Enrolment and educational performance (Basic, PSET)
- Performance on mathematics and physical science
- Adult literacy rates
- Science, engineering & tech. and doctoral graduates
- Skills and training (artisans and learnerships)

### Health

- Life expectancy
- Infant and under-five mortality rates
- Severe acute malnutrition under five years
- Immunisation coverage
- Maternal mortality ratio
- Disease prevalence (HIV, TB, Malaria)

### Positioning South Africa in the world

#### National identity and social relations

- Pride in being South African
- Identity based on self-description
- Public opinion on race relations
- Confidence in a happy future for all races

#### Public confidence in governance and institutions

- Country going in the right direction
- Citizen demand for and satisfaction with democracy

#### Civic engagement and participation

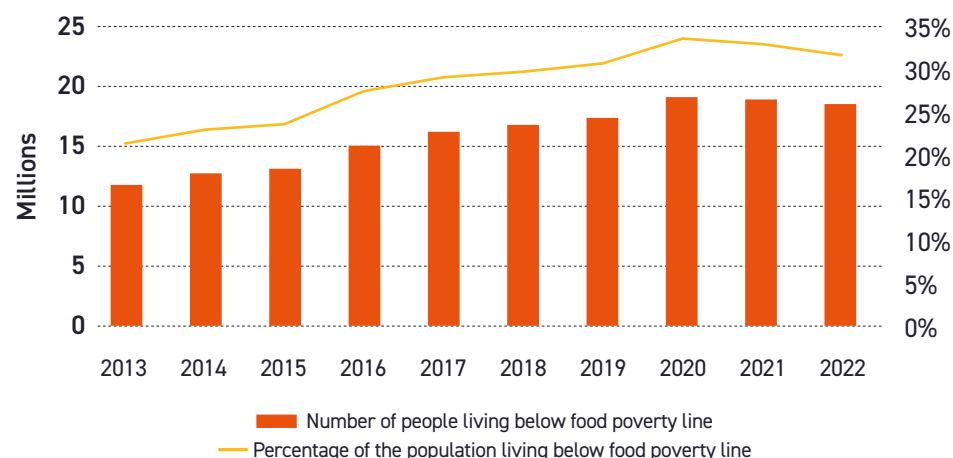
- Citizen voter participation
- Women representation in legislative bodies

#### Citizen satisfaction with service delivery

- Public opinion on the delivery of basic services

# A more equal society where no one is left behind

## People living below poverty line



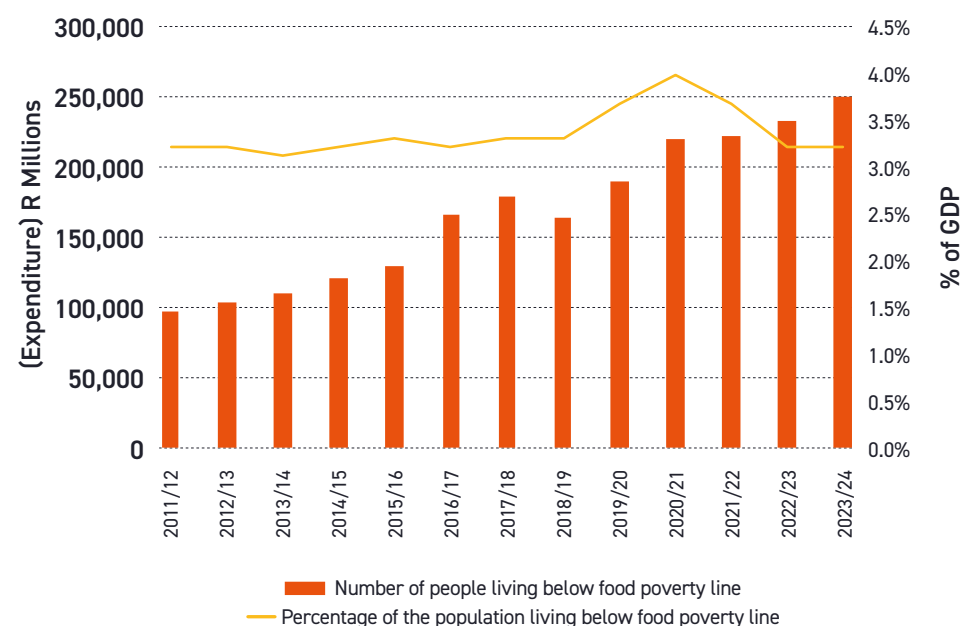
### POPULATION:

- Reached 63.02 million in mid-2024; 50% of the population lives in 17 major urban centres. Number of households doubled to 19 million over three decades, reducing average household size.
- Increased demand for schools, hospitals, clinics and infrastructure.

### POVERTY AND INEQUALITY:

- New data on poverty and inequality indicators are expected in 2025.
- In 2022, 18.8 million people lived below the poverty line, a decrease from 19.3 million in 2021.
- Almost 30.9% of the population could not afford the minimum required daily energy intake.
- KwaZulu-Natal had the highest proportion of people living below the poverty line, followed by Eastern Cape and Limpopo since 2018.
- White-headed households had the highest income, while Black African-headed households earned the least. Male-headed households earned more than female-headed households.

## Social-assistance grant expenditure

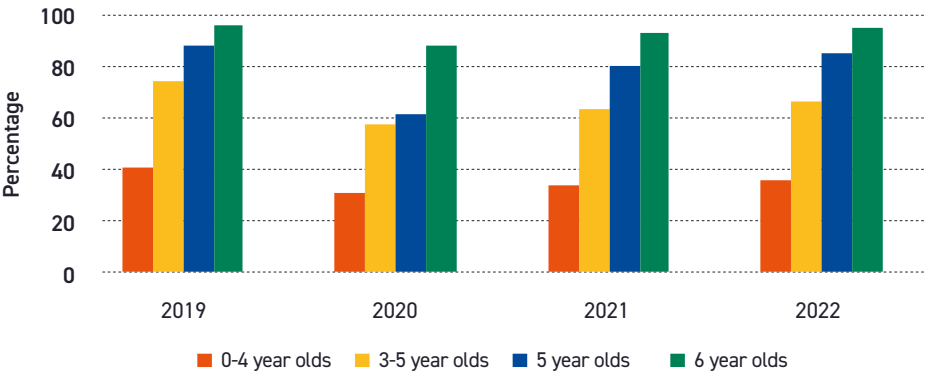


- Social grants recipients increased to 19.1 million in 2023/24 (increased from 18.8 million in 2022/23).
- When introduced in 2020, the Social Relief of Distress (SRD) grants increased the number of grant beneficiaries to approximately 28 million, 45% of the 62 million population.
- South Africa's expenditure on social grant increased significantly from 2013/14 to 2023/24.
- Expanded coverage of social grants and the social wage package - including access to free education and healthcare - helped mitigate the worst effects of poverty and enhancing human capabilities.
- Going forward, reducing dependence on social support should remain a priority, especially among the working-age population.

# Education and Training

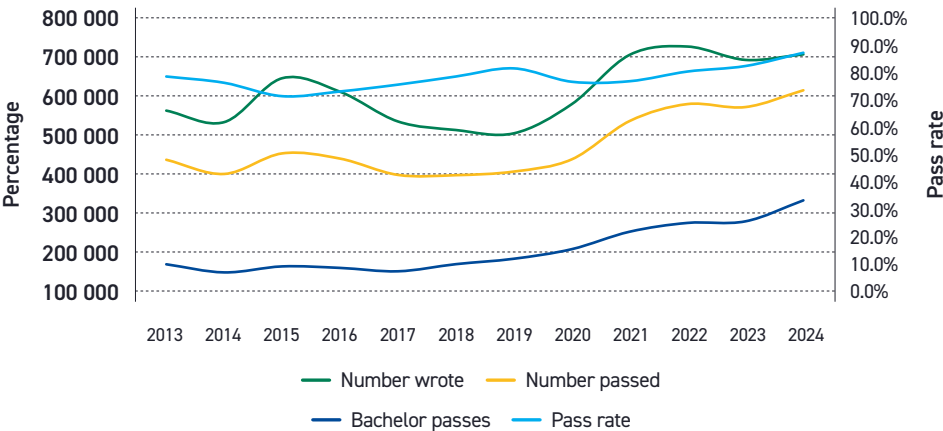
## Children attending Early Childhood Development (ECD) facilities

Goal: Two years of compulsory schooling for all 4 and 5 year-olds by 2030.



## National Senior Certificate examinations pass rate

Goal: Two years of compulsory schooling for all 4 and 5 year-olds by 2030.



- There is a general good progress, as the majority of children aged 3-6 have access to ECD education.
- Except in 2020 due to Covid-19 disruption, ECD attendance has remained consistently high – above 90% for 6-year-olds and 80% for 5-year-olds over the past decade.
- There is near-universal access to basic education for the compulsory school-age cohort (ages 7 to 15); and gender parity in enrolment and completion rates across various education levels.
- Number of learners who wrote the NSC increased from 691,160 (2023) to 705,291 (2024); The Matric pass rate has improved from 78.2% in 2013 to 87.3% in 2024, as the number of passes rose from 572,983 (2023) to 615,429 (2024); The Bachelor passes increased from 278 814 in 2021 to 282 894 in 2023. Performance in key subjects also improved over time as follows – but still remain below the NDP target of 450,000 passes:

### Mathematics:

- 2020: 125,526 overall passes → 2024: 173,774 overall passes (+48,248).

### 50% and Above:

- 2020: 52,073 → 2024: 76,058 (+23,985).

### Physical Science:

- 2020: 114,758 overall passes → 2024: 151,839 overall passes (+37,081).

### 50% and Above:

- 2020: 45,860 → 2024: 58,995 (+13,135).

- Implementation of the Basic Education Laws Amendment (BELA) Act should build on progress on ECD sector, to improve access, quality and educational outcomes.
- Improved NSC performance must be matched by an expansion of university and TVET sectors to accommodate growing demand for post-school education and training (PSET).

# Education and Training

## Skills and training (artisans and learnerships)

Goal: To achieve throughput rate of 30 000 artisans per year by 2030.

- In 2022/23, the number of completed artisan learnerships was 20,062, a decline from the 10-year peak of 24,050 recorded in 2019/20.
- Similarly, completed internships offered by the Sector Education and Training Authorities (SETAs) dropped significantly, from a record high of 7,711 in 2019/20 to a low of 2,051 in 2022/23.
- These interventions have provided participants with valuable experience that enhanced their skills and employability. However, the youth employment creation programmes must be reformed to address the limitations of the labour market to absorb trained youth at a greater scale.
- The declines are partly due to disruption of Covid-19 and budget and fiscal constraints. Their earlier peaks demonstrate the system's capacity to accommodate higher numbers and highlight the potential to meet the NDP target.

## Science, engineering & technology and doctoral graduates

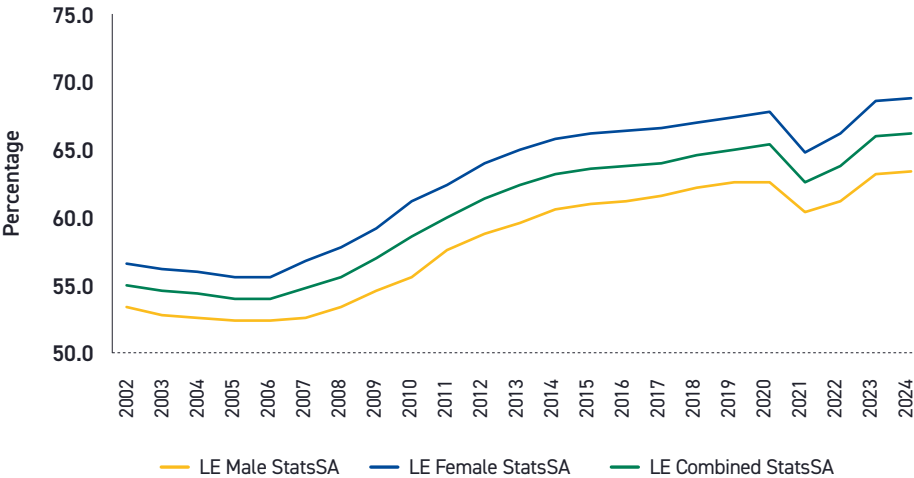
Goal: Increase the number of SET graduates and achieve 5,000 doctoral graduates per year.

- The total number of undergraduate and postgraduate students declined from 233,257 in 2021 to 225,702 in 2022, representing a decrease of 7,555 students.
- Despite this, the number of Science, Engineering, and Technology (SET) graduates increased from 55,574 in 2014 to 66,000 in 2022. A decrease of 1,422 SET graduates was observed between 2021 and 2022.
- Encouragingly, the proportion of SET graduates relative to total graduates rose from a low of 27.2% in 2020 to 29.2% in 2022 – a 2 percentage point increase. Doctoral graduates reached 3,690 in 2022, with a noticeable acceleration in growth since 2014. The target for doctoral graduates appears likely to be achieved but more effort is required to increase graduated in SET fields.

# Health

## Life expectancy

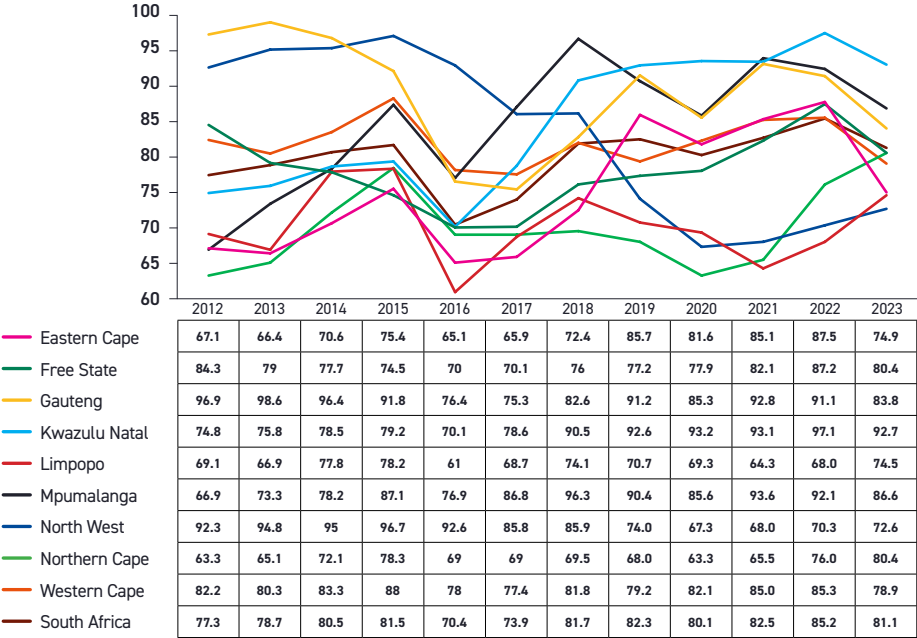
Goal: Average male and female life expectancy at birth increased to 70 years.



- In 2024, LE at birth in South Africa reached 66,5 years, up by 0,2 years from 2023.
- For males, LE increased to 63,6 years, while for females, it rose to 69,2 years.
- These gains are attributed to reduced mortality, increased ART access, maternal health programs and better management of HIV/AIDS and tuberculosis.
- Overall, immunisation rates have followed a positive trajectory despite some fluctuations. Coverage peaking at 85,2% in 2022 before declining to 81,1% in 2023. The rate remained above 80% over the past five years, having risen steadily from 77,8% in 2013.

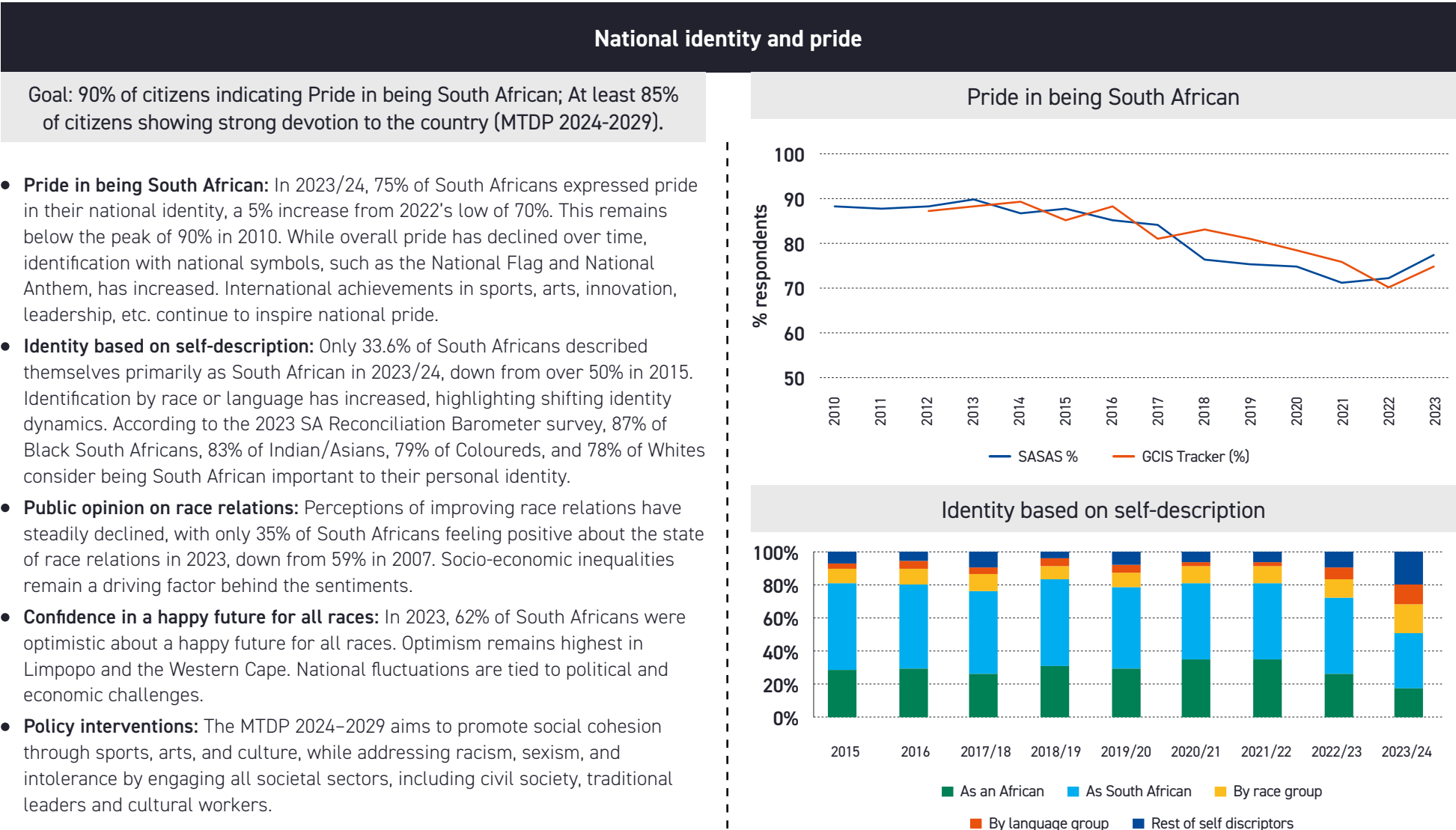
## Immunisation Coverage

Goal: Reduce maternal, infant and child mortality



- The Under-Five Mortality Rate (U5MR) improved from 74.7 in 2002 to 30.7 in 2022, on track to meet the SDG 2030 target of below 25 per 1,000 live births.
- The Maternal Mortality Ratio (MMR) in facilities declined from 157 in 2012 to 101 in 2022 – a significant gap remains to achieve the SDG 2030 target of below 70 per 100,000 live births.
- The public healthcare sector requires modernisation and service quality improvements, building on existing pockets of excellence and successful models.

# Social Cohesion and Nation Building



# Social Cohesion and Nation Building

## Public confidence in governance and institutions

Goal: Sustained citizen perceptions of country going in the right direction; confidence in core political institutions; citizen satisfaction with democracy

### Country going in the right direction:

- Only 33% of South Africans in the November 2024 GCIS Tracker felt the country was moving in the right direction, while 63% believed it was on the wrong path. Negative sentiment is linked to unemployment and poor service delivery.

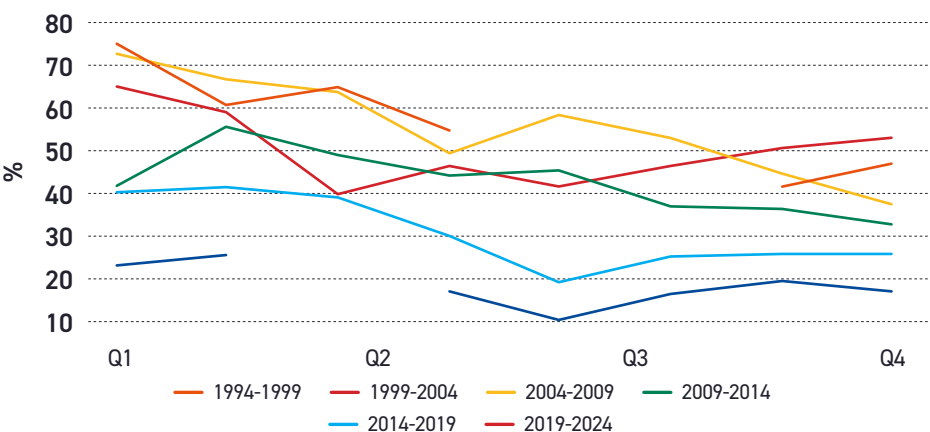
### Confidence in core political institutions:

- According to SASAS, only 21.6% of South Africans were satisfied with democracy in 2023, down from 48% in 2003. Confidence in national government fell from 69% in 2004 to 23% in 2023, while trust in Parliament declined from 65% to 21% and in local government from 48% to 25%. Similar declines affected courts, political parties and politicians. This mirrors global patterns of declining satisfaction and trust in democracy over two decades.
- The 2024 GCIS Tracker reported an uptick with confidence levels rising from 46% (February–March 2024) to 52% (October–November 2024).

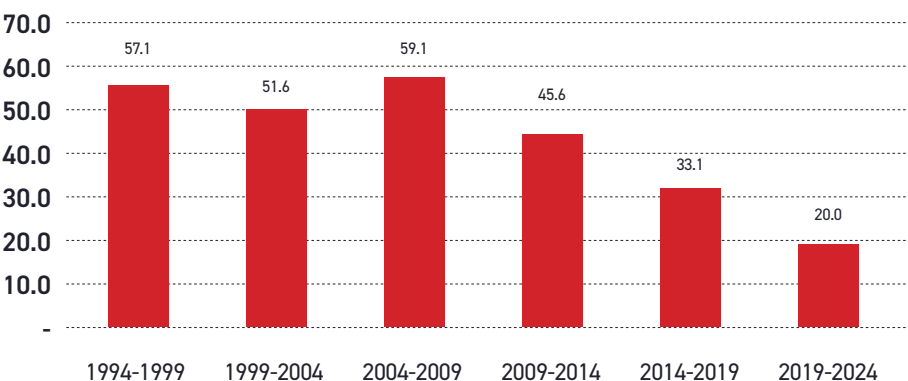
### Opportunities:

- The 7th Administration can leverage by improving service delivery, addressing corruption, transparent communication and effective management of multi-party coalitions at various levels.

### Country going in the right direction



### Country going in the right direction (Averaged per successive administrations)



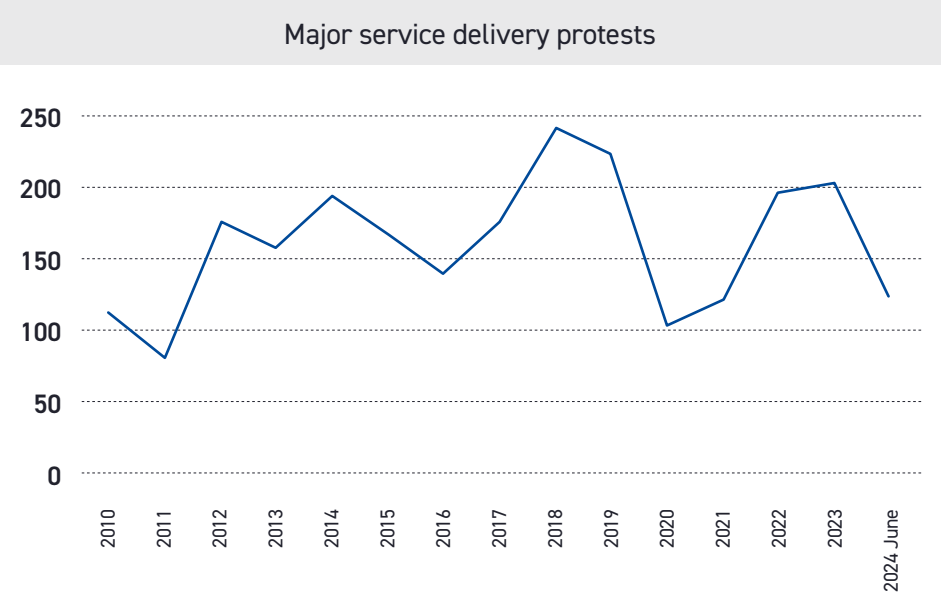
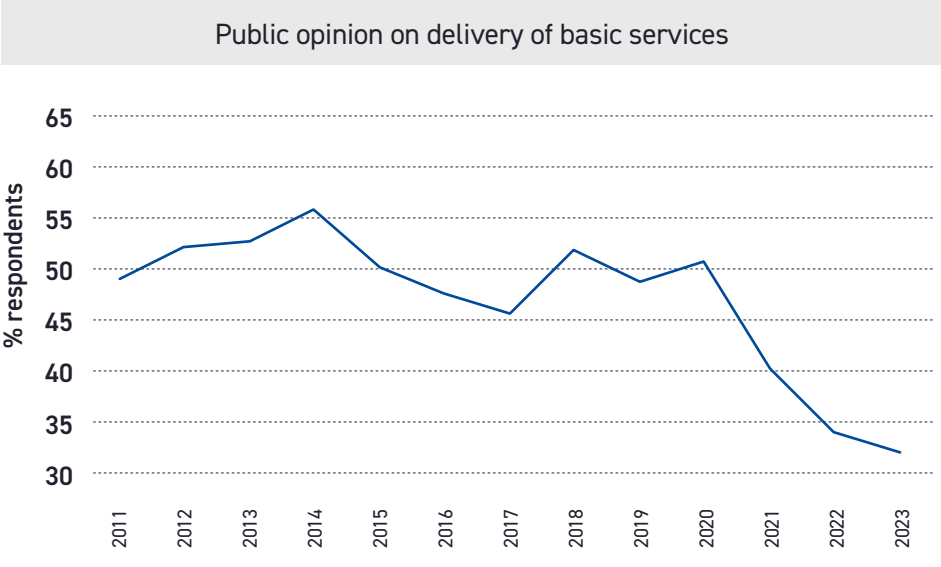
# Social Cohesion and Nation Building

Citizen satisfaction with service delivery

Goal: Public trust and confidence in local government

**Decline in public trust:** Confidence in local government service delivery has dropped from 52% in 2012 to 33% in 2023. This reflects growing public dissatisfaction.

**Rising service delivery protests:** South Africa recorded 198 major protests in 2023, primarily driven by issues with electricity and water services, though still below the peak levels of 2018 and 2019. Corruption, poverty, unemployment, and lack of institutional capacity, especially in municipalities, are key factors behind poor service delivery and rising public frustration.





# Social Cohesion and Nation Building

## Civic engagement and participation

Goal:

### Citizen voter participation:

- Voter participation was high in the early years of South Africa's democracy. The turnout has steadily declined despite an increasing eligible voting-age population (EVAP).
- 2024 National and Provincial Elections (NPEs): 2024 NPE was highly contested, with 52 political parties and for the first time including independent candidates. Voters' roll increased to 27.8 million registered voters. Turnout was 58.6% (down from 66.0% in 2019 and the lowest compared to 5 previous NPE).
- 2021 Local Government Elections (LGE): Lowest voter registration (65.7%) and turnout (45.9%). Only 30.1% of eligible voters cast their ballots.
- Participation of younger voters (18–19 age cohort) was 45% in 2024 NPEs, lowest compared to 70% in previously NPEs. Participation of this age cohort in 2021 LGE was 24%.
- Provincial participation rates in NPEs have gradually declined over the last three election cycles – 2014, 2019 to 2024. In 2024, NC, WC, GP, and KZN had the highest turnout, while LGEs saw peak participation rates in 2011 and 2016.

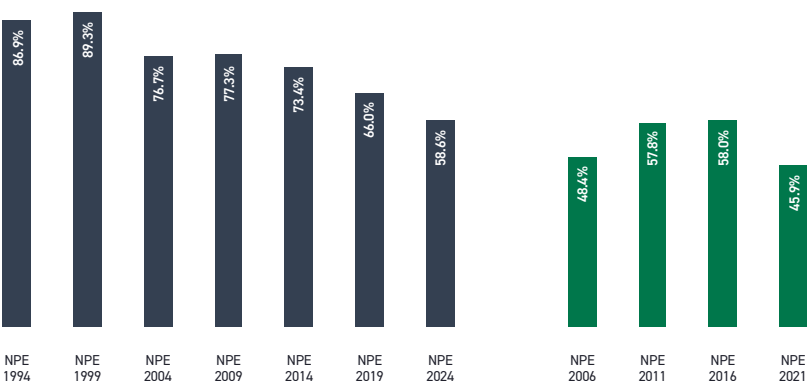
### Women's representation in legislative bodies:

- In 2024, women held 43.5% of parliamentary seats and 41.5% in provincial legislatures. While gender parity hasn't been achieved, South Africa continues to make steady progress toward greater political inclusivity for women.

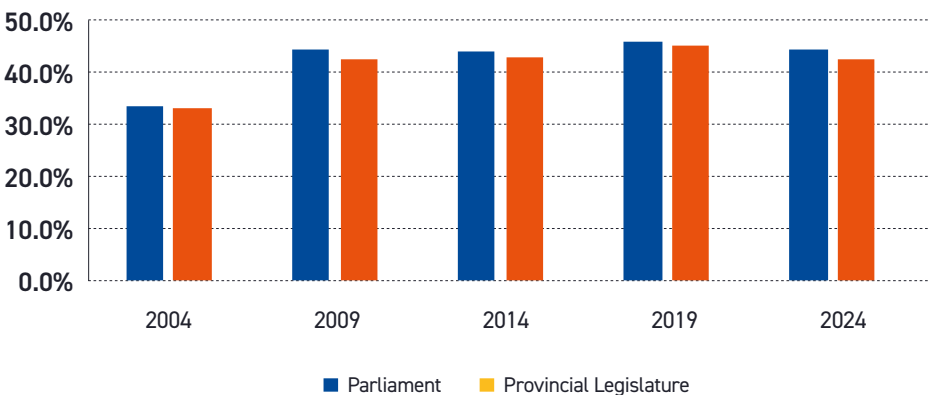
### Changing voting patterns and interventions:

- Recent elections showed shifting voting patterns – they delivered coalition governments at national, provincial and local spheres.
- The Electoral Reform Consultation Panel has been established to examine possible options for electoral reforms for the future.

### Voter participation in elections



### Percentage of women who are members of legislative bodies



# Strategic Priority 3: Building a capable, ethical and developmental state

## Selected indicators:

### Good Governance

- Revenue collection
- Audits outcomes
- Fighting corruption
- Fiscal sustainability and government debt
- Budget transparency
- International relations and partnerships

### A safe and secure environment

- Police to population ratio
- Combating crime of all forms
- Conviction rates
- Corrections (Inmates, Rehabilitation of offenders, Parole and probation)
- Improving road safety (reduce road accidents)

### A capable state delivering basic services to all citizens

- Household access to basic services:
  - Electricity
  - Potable water
  - Sanitation
  - Waste removal
- Meeting housing needs: Households in formal dwellings (vs informal dwellings, traditional structures)
- Quality, reliability and affordability of services

### International relation and partnerships

- SA's global diplomatic presence (diplomatic missions abroad, foreign in-country missions)

# Good Governance

## Revenue collection

**Goal: To strengthen the revenue collection capacity of government:**

- Consistent long-term growth in gross tax revenue collection. Gross tax revenue collection increased by 3% to R1.74 trillion in 2023/24.
- Income Tax Register has broadened over the past 10 years – from 17,8 million in 2013/14 to 32,0 million in 2023/24.
- Innovations enhanced tax compliance and collections and overall efficiency.
- Increasing revenue collection is highly dependent on stronger economic growth.

## Fiscal sustainability

**Goal: Achieve fiscal sustainability over the medium term:**

- The main budget deficit remained at -4.6% in 2022/23 and 2023/24, with a gradual decline expected to -3.4% by 2027/28. However, debt service costs continue rising, averaging 6.9% annually.
- Over the past 15 years, South Africa has maintained deficits, peaking at -9.8% in 2020/21 due to COVID-19 spending and SOE bailouts.
- The October 2024 MTBPS focuses on debt stabilisation, primary surpluses, and economic growth through structural reforms, infrastructure development and industrialisation.

## Budget transparency

**Goal: Ensure transparency and effective oversight:**

- Since 2006, South Africa consistently ranked among top 5 out of 120 countries in terms of the Open Budget Index (OBI).
- In 2023, South Africa achieved an OBI Transparency Score of 83.
- OBI score of 81 – 100 indicates that a country provided extensive information to citizens on its budgeting processes.

## Fighting corruption

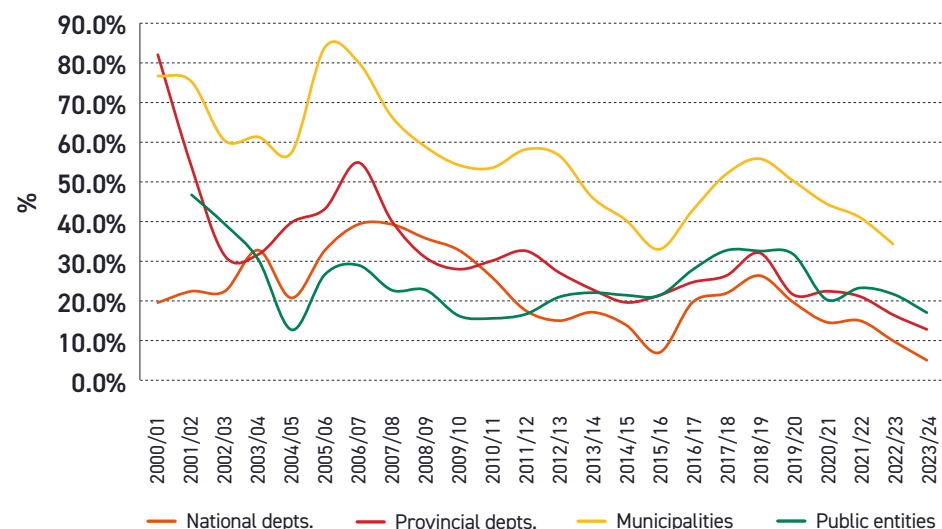
**Goal: Combat corruption and improvement country ratings on Corruption Perception Index by 5 (to 68/100) by 2024:**

- Transparency International's CPI Score for South Africa was 41/100 in 2023, and the country ranked 83 least corrupt country out of the 180 countries globally.
- The scoring scale is from 0 (highly corrupt) to 100 (very clean).
- South Africa is considered to have maintained transparency around corruption identification.
- The progress made in addressing the Financial Action Task Force (FATF) recommendations paves the way for removal of SA from the FATF grey list.

# Good Governance

## Public sector audit outcomes

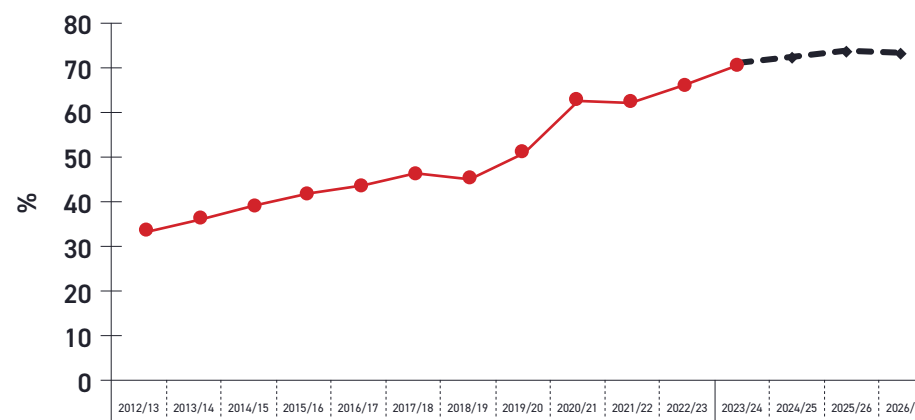
Goal: To reduce qualified, adverse and disclaimer audit outcomes in national and provincial departments, municipalities and public entities.



- 2023/24 Audit Outcomes indicate the 3rd consecutive year improvement, with a decline in qualified audits across national and provincial governments, and 2nd consecutive improvement for public entities.
- 2022/23 Municipal Audit Outcomes show steady improvement, with qualified audits decreasing from 55.5% in 2018/19 to 34.4% in 2022/23.
- Concerns remain on non-compliance and poor quality of spending – resulting in R406 billion in irregular expenditure since 2018/19.
- The Auditor General provided recommendations to enhance accountability and improve financial management across government entities.

## Government Debt

Goal: Achieve fiscal sustainability: Reduce gross debt-to-GDP ratio; Reduce debt service costs as a share of main budget revenue 2030 (MTBPS, 2024)



- South Africa's debt-to-GDP ratio reached a record high of 74,1% in 2023/24, the highest in over a decade.
- Net Government debt as percentage of GDP has been on the increase since 2012/13, and it accelerated from 2018/19 before slowing down from 2021/22.
- Net Government debt as a percentage of GDP is projected to reach 73.8% in 2026/27.

# A Capable state delivering basic services to all citizens

**Relevant NDP targets: NDP set various targets for delivering basic services to all citizens, covering access to housing, electricity, water and sanitation and safety and security.**

## Access to piped water and sanitation

NDP target: All South Africans have access to clean running water in their homes

- The number of households with access to piped water was 16,5 million in 2023, representing 87.0% of South African households. This reduced from 90% in 2015, mainly due to new settlements.
- Improved sanitation reached 83.3%, showing gradual progress since 2015. However, households using bucket toilets increased to 185,587 in 2023. Efforts must address infrastructure gaps and reliability of water supply, and acceleration of bucket toilets eradication, especially in the Free State (FS) and Northern Cape (NC).
- Blue Drop Certification Programme - incentive and risk-based approach to ensure quality in the water and sanitation sector. The 2021 assessment covered 1 186 water systems in municipalities and showed that 566 (48%) of them were at low-risk category, 217 (18%) at medium risk category, 136 (11%) at high-risk category and 267 (23%) at critical risk category.

## Access to housing

NDP target: Meeting housing needs of the poor by creating sustainable human settlements; adequate housing and quality living environments.

- Social housing programs have provided homes for over 13.7 million people, ranking among the largest housing initiatives globally.
- Between 2014 and 2023, the number of households in South Africa increased by 27.5%, from 14.9 million to 19.0 million. Ownership of formal dwellings improved from 54.5% in 2014 to 57.4% in 2023, driven by affordable housing innovations.
- Despite progress, housing demand remains high, and human settlement patterns continue to be inequitable, sometimes undermining spatial development goals.
- Informal dwellings have increased over the years and remain too high at 2.3 million in 2023.

# A Capable state delivering basic services to all citizens

Relevant NDP targets: NDP set various targets for delivering basic services to all citizens, covering access to housing, electricity, water and sanitation and safety and security.

## Access to electricity

NDP target: Increase households access to grid electricity to 90% by 2030, with balance met through off-grid technologies

- The number of households with access to piped water was 16,5 million in 2023, representing 87.0% of South African households. This reduced from 90% in 2015, mainly due to new settlements.
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## Safer and secure environment

NDP targets: Build safer communities by reducing crime, achieving a police-to-population ratio aligned with the UN benchmark (1:220), and improving public perceptions of safety

- Public perception of safety has declined, with fewer than 40% of people feeling safe at night for three consecutive years to 2024.
- The police-to-population ratio worsened to 1:412, far from the UN benchmark of 1:220, despite the recruitment of 20,000 new officers.
- There is a need to increase police deployment and implement targeted crime prevention strategies in high crime areas.

# Positioning South Africa in the World

## International relation and partnerships

Goal: Strengthen international relations and economic diplomacy to increase FDI, exports, tourism and cultural industries, and technology access (MTDP 2024-2029).

- For three decades, South Africa has maintained strong global diplomatic presence with over 120 diplomatic missions abroad, while foreign missions in South Africa have exceeded 300.
- About 40% of South Africa's missions (47) are in Africa.
- Recent strategic realignment has seen reductions in Latin America and Europe, reducing total missions from 125 to 115.
- Foreign representation in South Africa also dropped from 341 in 2015/16 to 308 in 2023/24.
- Changes reflect growing role in multilateral diplomacy and international collaboration.
- MTDP targets economic outcomes such as exports for South African products, attracting FDI, tourism, cultural exchanges and collaboration on global public good. Particular priority is implementation of African Continental Free Trade Area (AfCFTA) to deepen South Africa's trade integration with the rest of Africa

### Formal diplomatic missions

■ 1994 ■ 2014/15 ■ 2015/16 ■ 2018/19 ■ 2019/20 ■ 2022/23 ■ 2023/24

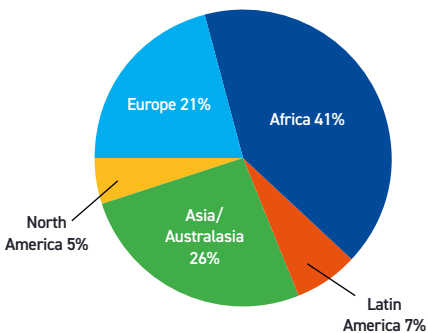


South African representation abroad

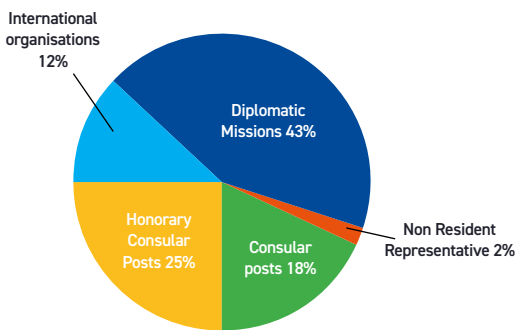


Foreign representation in SA

### SA representation abroad in 2023/24



### Foreign representation in SA (2023/24)



## Conclusions: Policy implications and relevant interventions

The Development Indicators (DI) 2024 Report provides a strategic evaluation of South Africa's development trajectory. It supports informed public dialogue, evidence-based policy discourse and a reflection on how key issues are addressed in government plans. Alongside its publicly accessible datasets, the report serves as a key reference for government, researchers, policymakers and development partners.

Importantly, the DI 2024 edition reaffirms the MTDP's three strategic priorities, with inclusive economic growth and job creation placed at the apex of the 7th Administration's agenda. The MTDP has appropriately identified strategic opportunities for acceleration. While implementing it, processes for long-term planning for beyond 2030 need to be initiated.

Notably, the assessment shows that none of the high-level NDP targets for reducing unemployment, poverty and inequality are currently on track to meet the 2030 goals. Achieving these will depend on sustained, higher economic growth and creating massive employment opportunities in line with the target of 11 million additional jobs (2012–2030). Using an expanded set of 85 indicators, the DI 2024 Report shows that 13 indicators (15%) are on track to meet their NDP 2030 targets, while 31 (36%) show promising progress, and 41 indicators (48%) are unlikely to meet their targets by 2030, as they are either stagnant, regressing, or lack clear quantitative benchmarks for measurement. The many intersecting factors underscore the complexities involved in assessing development progress. Situating this within a global context, as of 2024, only 17% of the SDGs were assessed to be on track globally and nearly half of the goals show minimal or moderate progress, while one-third have either stalled or regressed.





# Conclusions: Policy implications and relevant interventions

Key areas of progress identified in the 2024 DI Report – many of which are also highlighted in the 30-Year Review of South Africa's Democracy – present strategic opportunities to accelerate implementation through the MTDP 2024–2029:

- Progress in the infrastructure development pipeline, comprising 268 projects, of which 13 have been completed and over 80 are under implementation across energy, water, human settlements, roads, rail and ports. Government has committed R943.8 billion between 2024 and 2027 to this pipeline.
- Expansion of access to basic services through annual new household connections to meet growing demand. Currently, over 80% of households have access to electricity, water and sanitation.
- Continued contribution of public employment programmes, notably the Expanded Public Works Programme (EPWP) and the Presidential Employment Stimulus (PES).
- Near-universal mobile network coverage, including the increasing uptake of 5G technology.
- Sustained growth in gross tax revenue, improved tax compliance, and positive audit outcomes at national and provincial levels over the past five years.
- Progress in access to Early Childhood Development (ECD) for children aged 5 to 6; near-universal access to basic education for the compulsory school-age cohort (ages 7 to 15); and gender parity in enrolment and completion rates across various education levels.
- Expanded access to healthcare and trend of improved health outcomes, including gains in life expectancy and reductions in maternal and child mortality.
- An expanded, more diverse and transformed labour force achieved through progressive labour laws advancing representation across race, gender, age and skills.
- Policies and interventions advancing the rights and opportunities of women, youth, and persons with disabilities.
- Impact of expanded social assistance in reducing poverty and enhancing human capabilities.
- South Africa's international positioning and economic diplomacy, including opportunities in BRICS+ and the African Continental Free Trade Area (AfCFTA). Global achievements in sports, politics, science, the arts, etc. boost national pride and social cohesion.
- Progress in land reform, with 19.3 million hectares transferred by August 2024, achieving 78.1% of the NDP target.
- Environmental sustainability gains, with Greenhouse Gas Emissions remaining within the Nationally Determined Contribution (NDC) target range of 398–510 Mt CO<sub>2</sub>-eq, and expansion of the marine and terrestrial biodiversity areas.

These accomplishments are the result of progressive government policies and contributions from non-state actors, including NGOs, CSOs, the private sector and the international community.

## Conclusions: Policy implications and relevant interventions

While the NDP remains South Africa's long-term plan, key assumptions underpinning its adoption in 2012 have since shifted – including demographic changes, impact of COVID-19 pandemic and wider global disruptions. Population and migration patterns, for instance, have intensified demand for infrastructure, particularly in human settlement, education and healthcare. Global geopolitical and trade disruptions continue to challenge growth projections, underscoring the need for ongoing review and adaptation. Processes for long-term planning for beyond 2030 also need to be initiated, building on the pronouncement of the National Dialogue by the President.

Government aims to implement an integrated economic growth strategy anchored in accelerated structural reforms to foster private sector investment, innovation, productivity and international competitiveness. The ultimate test of this strategy will be to sustain South Africa's position as Africa's largest economy, enhance the global competitiveness of key sectors and city regions (such as Johannesburg, Cape Town, and Durban), and achieve inclusive employment growth.

To date, the Operation Vulindlela structural reforms have unlocked approximately R500 billion in new investments, which include 22,500 MW private investment pipeline in renewable energy; opening up private sector participation in port container terminals and later rail services; a 51% reduction in communications data costs for a 1.5 GB bundle; streamlined water use licensing processes and a transparent water quality monitoring system; and expansion of the eVisa system to 34 countries, boosting tourism and skills mobility.

Second-wave structural reforms are being introduced to build on the success thus far in unlocking economic potential and competitiveness. Local government must improve quality and reliability of basic services; digital public infrastructure must broaden connectivity and inclusion; and city regions must foster dynamic, business-friendly environments. Recommendations from market inquiries and competition reforms must translate into practical interventions

Industrialisation efforts will target labour-intensive sectors such as business services, agriculture, manufacturing and mining, alongside masterplans in key areas. Job creation should be supported by policies that enable private sector to create new jobs, and improved implementation of public employment programs as well as skills development in emerging industries such as digital services, oil and gas, biotechnology, green technologies, healthcare, medical devices and cultural industries like music and film production. International relations will be leveraged to attract investment, expand exports, promote tourism and develop technological capabilities.

Inclusive growth is essential to ensure that no one is left behind – requiring job creation, higher household incomes, and improved well-being for all citizens. Achieving these demands addressing the unequal ownership of economic assets and access to opportunities through accelerated redress, economic empowerment and spatial transformation to uplift the previously marginalised groups. Prioritising women, youth, and persons with disabilities will be central to these efforts.

## Conclusions: Policy implications and relevant interventions



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**2024**



# THANK YOU

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