

ENEMY OF GROWTH:

THE IDEOLOGY HOLDING SOUTH AFRICA HOSTAGE



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May 2025

Published by the South African Institute of Race Relations

222 Smit Street (Virtual office),
Braamfontein Johannesburg, 2000, South Africa
PO Box 291722, Melville, Johannesburg, 2109, South Africa
Telephone: (011) 482-7221

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Author: **Anthea Jeffery**

Editor: **John Endres**

Part 1: The National Democratic Revolution (NDR) and its socialist goal

The NDR route to a socialist South Africa

This paper describes how South Africa's dominant political force, the African National Congress (ANC) – along with its allies in the South African Communist Party (SACP) and the Congress of South African Trade Unions (Cosatu) – are acting to take South Africa to a socialist future. It references the ANC's and SACP's own documents and public statements and demonstrates the extent to which their decades-long plan is already being implemented.

In keeping with what the SACP has urged since the early 1960s, the shift to socialism in South Africa is being achieved by means of a Soviet-inspired “national democratic revolution” (NDR). The NDR concept can be traced back to Lenin's 1905 idea of a “two-stage” revolution: the first stage to establish a democracy and the second to usher in a socialist system by incremental steps forming part of a “national democratic revolution”. This idea was further developed by the Soviet Union in the 1950s to help take an increasing number of newly independent colonies in Asia and Africa from predominantly free market economies to socialist ones. Though this transition could sometimes be swiftly achieved, it generally required a series of “anti-capitalist transformations” implemented over many years.¹

In South Africa, both the SACP and the ANC have been committed to the NDR for more than 60 years. They see the NDR as providing “the most direct route” to socialism,² even though this process might take 30 to 40 years to achieve. They have also been busy implementing the NDR for more than three decades (since attaining power in 1994) and their revolution is already well advanced.

Despite the ANC's more moderate image, both organisations are equally committed to the NDR. This is evident, for example, in President Cyril Ramaphosa's address to the SACP's 15th national congress in July 2022. Here, Ramaphosa stated that the ANC was determined to “defeat each and every effort to derail the NDR”, which was the “shared programme” of the ANC and the SACP and “the reason for the existence of our alliance”.³

Ramaphosa has been widely portrayed as a pragmatic businessman keen to implement growth-focused reforms, but held back from doing so by the “radical economic transformation” (RET) faction opposing him within the ANC. In fact, the president is a black economic empowerment (BEE) billionaire, rather than a risk-taking entrepreneur, and has described himself as “a committed socialist”.⁴ He has also made it plain that the disputes within the ANC are “not divisions about policy or ideology” but are driven solely “by the competition for positions...and the pursuit of access to public resources”.⁵

The ANC and Ramaphosa remain strongly committed to the NDR despite the June 2024 introduction of a government of national unity (GNU) involving nine other parties. (The GNU was established in response to the May 2024 election results, in which the ANC's share of the national vote dropped to 40% from 57% in the 2019 poll, as outlined in due course.) Evidence of their continued commitment to the NDR is reflected in various developments. In October 2024, for example, the ANC launched a new "foundation course" on political education for its members. One of the primary goals of this course is to "instil a clear commitment to the National Democratic Revolution (NDR)" among all its members, both old and new. In January 2025, moreover, Ramaphosa again endorsed the NDR: this time in the ANC's annual anniversary statement. Both the ANC and the SACP remained committed to this "shared theory of fundamental change" and would stay united, organised and mobilised to prevent its "being defeated by counter-revolution", he said.⁶

Planning for NDR implementation

Planning for NDR implementation takes place every five years: first, at the national congresses held by the SACP at five-yearly intervals and then, some months later, by the ANC at its own five-yearly national conferences. The SACP sets the framework, which the ANC then fleshes out through its "*Strategy & Tactics*" (S&T) documents. These S&T documents set out the ANC's long-term objectives (its "strategy") as well as "the immediate and medium-term tasks" (the "tactics") needed to achieve them. Since these documents are publicly available (unlike the ANC's confidential deliberations), they generally play down the NDR's socialist goal while taking care to portray the ANC's planned interventions in a positive light. They nevertheless provide important insights into core NDR aims and concepts.⁷

S&T documents invariably blame South Africa's worsening socio-economic challenges – many of which stem from damaging NDR interventions already implemented – on "colonialism of a special type" (CST). According to this CST perspective, the white minority is an illegitimate colonial oppressor which derived its prosperity and "privilege" solely from its ruthless exploitation of the black majority from 1652 to 1994, when democracy was finally attained. The only way to overcome the ongoing legacy of CST is to change the "ownership, control, and structure" of the economy. Whites must thus be stripped of their "stolen" land and other wealth, which must be "returned" to the black majority as represented by the ANC.⁸

To help attain its NDR goals, the ANC constantly wages a "battle of ideas" aimed at shaping public opinion in ways helpful to the revolution. It also continuously monitors the "balance of forces", both domestic and foreign, to assess when the time is ripe for it to forge ahead and when resistance to its plans is strong enough to compel a tactical (and temporary) retreat.⁹

Another vital ANC task is to keep “channelling the energies of the motive forces towards the success of the NDR”. The motive forces of the NDR are “the classes and strata” most likely to benefit from the revolution. The “main motive force” is “the black working class, both employed and unemployed”. Important too are “the black middle strata” – who benefit from BEE and agitate for its expansion – and “black youth”, whose “impatience, militancy and imprudence” can secure change even during “moments of inertia and excessive risk-aversion”.¹⁰

The ANC, together with the SACP, Cosatu and “progressive structures of civil society”, must also keep confronting “the primary enemy of the NDR”. That enemy is “monopoly capital” – defined as “the local and foreign corporations that control large chunks of the economy”.¹¹ In its confrontations with business, the ANC seeks to use all the tools at its command, including “licensing, regulation, taxation, procurement, and activism by competition authorities”. Its key objectives are to “redistribute income, further change the structure of ownership...and direct investment into areas that promote national development”. In time, it must also ensure that “public goods” – including healthcare, education, social security, and transport – are “provided primarily by the state” and not the private sector.¹²

Part 2: NDR implementation in an initial “political” phase

The political transition in April 1994 – when the ANC was accorded 63% of the national vote following a chaotic and often fraudulent election – was “a historic breakthrough”. It gave the ANC the “prime prize” of “state power” and enabled it to start implementing the NDR.¹³ Implementation began in the political arena, where the ANC’s hold on power was still weak, and was expected to shift to the socio-economic sphere once this problem had been overcome.

Writing and sometimes sidestepping the Constitution

The ANC sees itself, not as an ordinary political party, but rather as a liberation movement with a historic mission to implement the NDR. In its view, this mission entitles it to repudiate agreements it has previously endorsed, including the interim constitution of 1993 and other aspects of the negotiated settlement.¹⁴

To help advance the NDR, the ANC needed a new constitution that would centralise power, minimise checks and balances on the executive, and allow the introduction of ever more intrusive NDR policies.¹⁵ To secure these gains, the ANC used the multiparty negotiations in the early 1990s as an “additional terrain of struggle” in a continued “people’s revolutionary war” aimed at ensuring its dominance over the talks. This strategy was so successful that SACP chairman Joe Slovo was able to claim a “famous victory” in late 1993.¹⁶

A key achievement was that the interim constitution that was agreed in 1993 was to be replaced by a “final” text within two years. This final constitution would have to comply with 34 constitutional principles, but otherwise (as Slovo stressed) “everything in the interim constitution could be rewritten” in ways helpful to the NDR.¹⁷

The final text adopted in 1996 bought many NDR gains. It ended power-sharing in the executive via a government of national unity, reduced already limited federal powers, weakened property rights, and gave the ANC significant control over judicial appointments, policing, and prosecutions.

The final text also included various justiciable socio-economic rights: mainly in the form of rights of “access” to housing, healthcare, food, water, social security, and the like.¹⁸ These clauses were in keeping with the NDR claim that “real” socialism is all about “decent shelter...for the homeless,...safe drinking water, healthcare,...[and] a life of dignity for the old”, as SACP general secretary the late Chris Hani had earlier asserted.¹⁹

The inclusion of socio-economic rights would also advance the “Cloward-Piven” strategy, as developed in the US in the 1960s by two Columbia University sociologists, Andrew Cloward and Frances Fox Piven. This strategy seeks to hasten the fall of capitalism by overloading the government with a flood of costly and increasingly impossible demands, thus pushing society into crisis and economic collapse.²⁰

In a ground-breaking additional gain, the final constitution also included a clause giving the new bill of rights not only “vertical” but also “horizontal” application. Applied vertically, the bill of rights would empower residents (not necessarily citizens) to demand that the state fulfil the socio-economic rights. Applied horizontally, the bill of rights would empower the state to enforce the socio-economic rights against the private sector.²¹ This would greatly increase the ANC’s capacity to compel “monopoly capital” to help implement the NDR. Over time, it would also allow the ANC to push businesses into bankruptcy, as is now illustrated by the National Health Insurance proposal (see below).

Despite these important gains, many clauses in the final Constitution were still in conflict with NDR perspectives on race, multi-party democracy, the rule of law, and judicial review. The ANC’s initial response was to circumvent these clauses in various ways. In 2011, however, it also began calling for the removal of judicial review: the power given to the courts to strike down unconstitutional laws and executive conduct. To buttress this demand, it began claiming that the Constitution was “fatally” flawed by the compromises allegedly “forced” on it during the negotiations process. By 2022, “the narrative that the settlement of 1994 was fundamentally unjust had become hegemonic”, notes political analyst Jonny Steinberg.²²

Cadre deployment to control all “centres of power”

Since 1994 the ANC has further undermined many constitutional checks and balances by deploying its loyal cadres to all levers of power. The overarching goal of its *Cadre Policy and Deployment Strategy*, as finalised in 1998, is to “win hegemony” for the ANC by deploying the “correct people” to all “key centres of power”.²³

According to this 1998 document, the “centres of power” to be targeted include all state entities, along with “all other sectors of social activity”. The latter are listed as “the economy, education, science and technology, sports, recreation, arts and culture, mass popular organisations,...and mass communication”. As political analyst RW Johnson points out, “nothing is off limits to the ANC” in its determination to dominate all organisations, from universities and sporting bodies to business associations, NGOs, and churches.²⁴

A national deployment committee established in 1998 (with regional and local counterparts) was headed by Jacob Zuma and dominated by the SACP. It soon succeeded in deploying ANC loyalists to various institutions whose independence is guaranteed by the Constitution, including the Electoral Commission and the National Prosecuting Authority. As the SACP was later to boast, “tens of thousands” of its members were also deployed to powerful positions in the public sector, the police and intelligence services, the cabinet, Parliament, provincial administration, and local government.²⁵

Cadre deployment conflicts with a constitutional clause stating that “no employee of the public service may be favoured or prejudiced only because that person supports a particular political party or cause”.²⁶ It also clashes with a host of other constitutional obligations. The public service is supposed to promote the “efficient and economic... use of resources”, but cadre deployment encourages over-manning and corruption. Parliament is meant to reject all unconstitutional bills, but ANC MPs deployed to the legislature are expected to obey the ANC’s senior leaders, not honour their oaths to uphold the Constitution. The National Prosecuting Authority is supposed to “exercise its functions without fear, favour, or prejudice”, but its deployed cadres are generally loath to prosecute ANC leaders implicated in crimes ranging from corruption to political assassination.²⁷

These clashes are symptoms of a broader problem. In the words of political analyst James Myburgh, “the ANC’s cadre deployment policy has created a ‘dual authority’ with ‘ostensible authority’ lying in the Constitution and Parliament and ‘real authority’ lying with the party”.²⁸ This dual authority is vital in advancing the revolution, for it weakens all constitutional guardrails by entrusting their enforcement to cadres whose primary loyalty is to the NDR.²⁹

Undermining Parliament and multi-party democracy

The Constitution provides for “a multiparty system of democratic government” aimed at ensuring “accountability, responsiveness, and openness”. It requires Parliament to uphold these values and ensure the executive does so too. The ANC pays lip service to these provisions, but its real commitment is to the NDR. It also believes it has a unique entitlement to rule while it completes the transition to socialism – and regards all opposition parties as illegitimate obstacles to NDR implementation.³⁰

The ANC uses both verbal and physical attack to weaken opposition parties. Since 1999, its stigmatisation has been directed primarily at the Democratic Alliance (DA), which became the official opposition in that year and has since won control of the Western Cape provincial administration, the Cape Town metropole, and dozens of local councils.

Though the DA has many black members and leaders, the ANC repeatedly castigates it as a “white” party that will bring back apartheid if it ever wins power.³¹ Journalists often also follow the ANC line by “denigrating and maligning the DA as an inconvenient and ill-conceived nuisance” (as political analyst Gareth van Onselen has put it).³²

Stigmatisation has sometimes been supplemented by physical attack. When the party started expanding its support in Khayelitsha (Cape Town) in 2011, black people who identified with the DA were “tried” in kangaroo courts or had their homes destroyed. Three children of a local DA leader were burnt to death,³³ while DA leader Helen Zille was shot at and injured.³⁴

Several DA local councillors have been attacked in recent years,³⁵ while at least two DA councillors have been killed. In the case of Johannes Baatjies, a DA local councillor-elect in Postmasburg (Northern Cape), the hit was organised by an ANC councillor seeking to trigger a by-election that would restore ANC control over the municipality in the aftermath of the 2016 local government election. (However, Baatjies’s killing backfired on the ANC, as the DA won 72% of the by-election vote – partly out of sympathy with his plight.)³⁶

Attacks on the DA are a small fraction of those carried out against the Inkatha Freedom Party (IFP), long the ANC’s most formidable black rival. In the ten years before the April 1994 election, at least 340 IFP office bearers were killed, along with many thousands of IFP supporters. Since 1994, another 129 IFP office-bearers and councillors have been assassinated. Most of these killings have passed unremarked by the media.³⁷

The ANC has weakened Parliament in a variety of ways. Opposition parties have little chance to question ministers under changed rules favouring ANC MPs and their “sweetheart” queries. Bills are often rushed through the legislature, with little attempt at proper public consultation or genuine debate.³⁸ Many of the measures enacted are economically destructive and clearly in conflict with the Constitution.³⁹

ANC control over its MPs is cemented by cadre deployment and an electoral system – proportional representation on party lists – that excludes constituencies and any resulting loyalty to voters. In the words of ANC stalwart Omry Makgoale, “voters have no protection...since they do not choose any MP as an individual and they cannot sack any MP as an individual”.⁴⁰

In May 2024 the ANC was widely praised for accepting the results of a general election in which its support fell to 40% and it then agreed to establish a GNU in which the DA, with 22% of the vote, was expected to have considerable influence. However, the ANC then marginalised the DA by packing the GNU with small parties and giving itself 65% of all cabinet posts, against 18% for the DA. (At the deputy minister level, it took 82% of posts and gave 13% to the DA.) Yet both parties had previously signed a Declaration of Intent under which ministerial appointments were supposed to be proportionate to seats won. The ANC also brushed the DA aside in forging ahead with three particularly damaging NDR statutes adopted by Parliament in the pre-GNU period (see below). In February 2025 the DA succeeded in blocking a two-percentage point increase in the VAT rate proposed by the ANC to help fund increased spending, which boosted the DA’s support. The ANC then proposed a smaller VAT increase (a one percentage point rise in the rate, spread over two years), but the DA effectively defeated this too by challenging the validity of the budget process in the courts. The finance minister has suspended the proposed increase and is to table a revised budget on 21 May 2025.⁴¹

Eroding judicial independence

The founding provisions of the Constitution – its most important clauses – guarantee the “supremacy of the Constitution and the rule of law”. They require judicial independence and impartiality, and give the Constitutional Court final authority to strike down any legislation or executive conduct inconsistent with the Constitution.⁴²

The ANC long been determined to control the judiciary, which it identified in 1998 as a vital “lever of power”.⁴³ Clear evidence of cadre deployment to the bench has yet to be found, but the ANC expressly aims to change the “collective mindset” of the judges and has urged them to help advance the struggle against “white minority domination”.⁴⁴

The ANC has also obtained effective control over all judicial appointments. Though most appointments are decided by a supposedly independent body, the Judicial Service Commission (JSC), the ANC in practice appoints more than half the JSC’s members. This ensures that “no one out of favour with the ANC has any chance of appointment to the bench” (as the late Judge Rex van Schalkwyk – who resigned in 1996 in protest against the ANC’s undermining of judicial independence – has pointed out.)⁴⁵

Since 2011 the ANC has increasingly questioned the legitimacy of judicial review, saying it “makes nonsense of the democratically elected Parliament”⁴⁶ and risks turning South Africa into a “judicial dictatorship”.⁴⁷ It has also been moving towards an “East German” concept of judicial review, under which the courts are expected to “harmonise” their rulings with what the executive wants.

The East German emphasis goes back to a 2012 discussion document on the judiciary. This noted that judicial review is applied differently in different countries, allowing states to “choose what is appropriate for themselves”. It also stressed “the necessity for the three branches of the state to act co-operatively to realise the transformation goals of the Constitution”.⁴⁸

This wording, wrote Loammi Wolf, a legal academic with in-depth knowledge of South African and German law, pointed to a possible shift to the East German system of judicial review, as applied in the former German Democratic Republic (GDR).⁴⁹ According to Wolf, the GDR model required the judiciary to “take note of the political and economic policies of the [ruling party] and adjudicate accordingly”. The striking down of law or executive conduct was prohibited, as this reflected a “Western” notion of judicial review.⁵⁰

The East German concept gained further ground in 2015 when the then head of the judiciary (Chief Justice Mogoeng Mogoeng) agreed to hold regular meetings with the head of the executive (President Jacob Zuma) and the heads of Parliament (the Speaker of the National Assembly and the Chairperson of the National Council of Provinces). This, said Mogoeng, would “strengthen co-operation between the three arms of state” and prevent one arm from “encroaching on the terrain of the other”. Zuma welcomed Mogoeng’s proposal, saying these meetings would help the state to “harmonise its work”.⁵¹

Though many Constitutional Court judgments are sound, on issues important to the NDR the court has handed down various rulings that are extraordinarily weak. In 2004, for example, the Constitutional Court discounted a key part of the equality clause requiring those who apply race-based preferences to prove the fairness of these measures.⁵² By treating this sub-clause as if it had never been written (*pro non scripto*), the judgment amended the Constitution rather than giving effect to it.

In 2016 the Constitutional Court ruled that an affirmative action or “employment equity” plan requiring, for example, the appointment of “51 African males, 198 African females, and 2 Indian females” at various levels in the prisons service did not lay down rigid and illegal quotas but merely set out flexible and thus lawful targets.⁵³ In 2013, in another obviously flawed ruling (in the *Agri SA* case outlined below), it gave implicit judicial sanction to the indirect expropriation without compensation of mineral, water, and land resources.

By aligning its most important judgments with the ANC’s “transformation” objectives rather than what the Constitution says, the Constitutional Court has quietly taken the country closer to the “co-operative” East German model of judicial review, with its emphasis on policy “harmonisation” between the three branches of government.

Advancing the NDR via the “battle of ideas”

The ANC is well aware that incremental NDR interventions can be made only when the “balance of forces” favours the next step to be taken. Public opinion must therefore be moulded to support NDR policies via “the battle of ideas”. This must be fought “like a real war”, with a “strict coordination” of the messages put out. The aim is to help the ANC “capture the narrative”⁵⁴ on four key issues, in particular: racism, colonialism, capitalism, and neo-liberalism.

Though President Nelson Mandela (1994 to 1999) emphasised racial reconciliation,⁵⁵ in 2000 the ANC began claiming that “the demon of racism” remained pervasive⁵⁶– and had both “subjective” and “objective” elements. The subjective element was found in the crude stereotypes that all whites (supposedly) endorsed about black people being “savage, violent, disrespectful of private property, incapable of refinement through education, and driven by hereditary dark, satanic impulses”. According to the ANC, all media criticism of the government was driven by this stereotype and the need to show that “the rot had started...when the African barbarians took over from the civilised whites”.⁵⁷

As for the “objective” element in racism, this was evident in major “racial disparities” in wealth, skills, education, and opportunities “in favour of whites”, as well as the “over-representation” of whites in management and the professions. These disparities showed that “South African society continued to be structured according to the racist prescription that the whites are superior and the blacks inferior”. The gaps also confirmed that “power-relations” remained skewed, with whites still positioned as “the dominant” group and blacks as “the dominated” one.⁵⁸

The Democratic Party (DP), as the DA was then called, said this analysis was false but served various political purposes. The ANC’s concept of subjective racism was “a fairly crude and transparent attempt to silence dissent”. Its claims about objective racism and skewed power relations allowed it to shift the blame for its own failures to uplift the poor on to the white minority. These claims also explained why whites had to be removed from their “dominant positions” in all “centres of power” and exonerated blacks from any role in racism for as long as the alleged power imbalance remained.⁵⁹

From 2012 onwards, the focus shifted to include colonialism too – with the blame for persistent black poverty and inter-racial inequality now placed on both colonialism and racism (sometimes elided as “apartheid colonialism”). As the NDR script required, whites were increasingly derided as “colonialists” whose undeserved “privilege” stemmed from their having “stolen” the land and ruthlessly exploited the black victims of their theft.

Zuma, who had largely avoided Mbeki’s repeated racial vituperation, embraced the colonialism narrative in 2015 when he claimed that all South Africa’s problems had begun in 1652 with the arrival of Jan van Riebeeck at the Cape.⁶⁰

In 2016 Zuma added that the government should no longer pay for the land that had been “stolen” by white colonialists. The land had been “taken, not bought” and was now “the key source of poverty, inequality and unemployment”, he said.⁶¹

In 2017, shortly before his election as ANC president, Ramaphosa echoed this assessment, saying: “Our land was stolen from our forebears, leading to the destruction of the asset base of the African people and resulting in the impoverishment of the black nation.”⁶²

That white colonialism brought only theft, genocide, and ruthless exploitation is now a dominant NDR narrative. It has also been strongly reinforced via harsh invective and potentially draconian punishment for people who dare to question this perspective.⁶³

NDR criticisms of racism and colonialism have long been used to inveigh against the free market too. The supposed “symbiosis between political oppression and the apartheid capitalist system” has repeatedly been stressed.⁶⁴ More recently, the SACP/ANC alliance has frequently accused the free market system – despite its enormous successes in curbing environmental damage and lifting billions of people out of poverty⁶⁵ – of spewing so much carbon dioxide, pollutants, and waste into the environment as to threaten human civilisation with extinction.⁶⁶ According to the SACP, “the only hope for a sustainable world lies in a radical transition to socialism”.⁶⁷

NDR accusations against “neo-liberalism” are another key element in the battle of ideas. In its 2012 programme, *The South African Road to Socialism*, the SACP stressed the vital importance of confronting neo-liberalism – which it identified as “the hegemonic ideology of our times” and the “dominant threat” to the struggle for socialism.⁶⁸

According to the party, the “main features” of neo-liberalism are “an obsession with ‘growth’” and free markets, a focus on individuals rather than classes, and “a discourse of checks-and-balances” which seeks to limit state power and uphold private property rights.⁶⁹ These concepts, it says, must be replaced by ideas that promote the NDR and acquire a “hegemonic influence”.⁷⁰

What the ANC characterises as “neo-liberalism” and seeks to defeat are the principles of classical liberalism underpinning many Western democracies. These principles put individual rights before group entitlements, guarantee equality before the law irrespective of immutable physical characteristics, impose necessary checks and balances on executive power, and emphasise the importance of free markets in securing liberty and promoting upward mobility for all.

Part 3: NDR implementation in its more radical “socio-economic” phase

NDR implementation in the more radical “socio-economic” phase began in 2012. Since then, the focus has been on the “elimination” of existing property rights⁷¹ and the need for a “fundamental change” in “the structure...of the economy”, as well as in its “ownership, management, and control”. To achieve these goals, as Zuma said in 2017, the ANC aims to “utilise to the maximum the strategic levers that are available to the state”. These include “legislation, licensing, and...procurement” rules, along with “BEE charters”.⁷² Zuma added that it might also be necessary to implement expropriation without compensation (EWC) – and that the Constitution might need to be amended to allow this.⁷³

Demographic representivity in employment, ownership, and procurement

The NDR seeks to keep changing the “ownership and management” of the economy – generally via “employment equity” (EE) and “black economic empowerment” (BEE) rules – until such time as “all centres of power and influence have become broadly representative of the country’s demographics”.⁷⁴ This push for demographic representivity is supposedly needed to redress apartheid wrongs. However, it also weakens property rights and deprives the private sector of many of the essential perquisites of management, including the capacity to appoint staff, choose business partners, and select suppliers on merit and without reference to race.⁷⁵

In devising its EE and BEE rules, the ANC has relied heavily on a supposed “norm” of demographic representivity (which has also been used to legitimise racial targets in the US and other Western countries). Firoz Cachalia, an ANC office-bearer in Gauteng, summed up this supposed “norm” in 1998 when he said: “Since ability is randomly distributed among the entire population, black and white South Africans should be represented in the workforce according to their share of the overall population. If whites instead consistently outnumber blacks in management, skilled jobs, and the professions, then for those who reject the idea of superior and inferior races, the only explanation is that white dominance is the result of racial discrimination.”⁷⁶

Cachalia’s argument may seem superficially convincing, but it overlooks many important variables affecting eligibility for senior and professional positions. These variables are particularly important in South Africa, where some 50% of black people are too young (under the age of 35) for senior appointments, 46% are unemployed (on an expanded definition that includes discouraged workers not actively seeking jobs),⁷⁷ and only 5% have the university degrees often necessary or advisable for management posts.⁷⁸

These and other relevant factors make EE targets based on the black share (80%) of the economically active population extremely difficult to fulfil. The EE Act of 1998 nevertheless requires all employers of 50 people or more to make “reasonable progress” towards demographic representivity at all levels of the workforce or face maximum fines ranging from 2% to 10% of annual turnover (not profit).⁷⁹

Progress towards the EE Act’s goal has been extraordinarily rapid in the public sector, where in 2023 black people held 75% of top management jobs and 76% of senior management posts.⁸⁰ Often, however, those appointed to demanding posts are deployed cadres lacking skills and experience. This has triggered a crippling loss in capacity, which has greatly harmed millions of poor black South Africans dependent on the state for water, sanitation, education, healthcare, electricity, and the like.⁸¹

Despite these adverse impacts, the private sector – which has no tax revenues and depends on its efficiency to survive – is also required by the EE Act to attain the same unrealistic racial targets. Since business has supposedly failed to do so (in 2023 black representation in the private sector stood at 14% at the top management level and 21% among senior managers),⁸² in 2022 the government amended the EE Act to give the minister of employment and labour the power to impose binding EE targets on employers in all sectors of the economy.⁸³ The amended Act was brought into force on 1st January 2025,⁸⁴ against the objections of the DA, in particular.

Employers of 50 people or more must now meet racial targets that persistent skills shortages within the black population make it extremely difficult to fulfil. Yet companies that fail to do so are likely to face fines starting at 2% of annual turnover and rising to 10% of annual turnover for repeat “offences”. They may also be excluded from doing business with the state,⁸⁵ which could reduce the pool of experienced contractors eligible for state tenders and push up public procurement costs.

Many businesses – and especially those needing state permits or wanting to win tenders from the government – must also comply with BEE “codes of good practice”.⁸⁶ Under these codes, companies must transfer at least 25% (and often more) of their equity or assets to BEE “investors” with little money and limited business experience. These BEE deals are costly, with R1 trillion allocated to them by 2020 and another R1 trillion likely to be required.⁸⁷

Companies subject to BEE codes must also meet state-specified EE targets ranging from 88% for junior managers to 60% for senior management posts. In addition, they must procure 80% of the goods and services they need each year from BEE firms with at least 25% (and often 51%) black ownership. Such firms do not exist in the numbers required by the rules.⁸⁸

In the public sector, preferential procurement requirements have long encouraged corrupt tendering by a host of state entities, including SOEs. All these entities are replete with deployed cadres, who commonly use their insider knowledge and political influence to secure tenders at inflated prices for BEE companies linked to themselves, their families, and/or their friends.⁸⁹

Two senior Treasury officials have publicly warned against the damage being done. In October 2016 chief procurement officer Kenneth Brown said that between 30% and 40% of the state’s annual procurement budget (then worth R600bn) was being lost to “fraud and inflated prices”.⁹⁰ In August 2018 his acting successor, Willie Mathebula, told the Zondo commission of inquiry into state capture that “the government’s procurement system was deliberately not followed in at least 50% of all tenders”. Moreover, once the normal rules had been bypassed, “a contract which started at R4m was soon sitting at R200m”. This had enormous ramifications, for the government was “the biggest procurer of goods and services, spending an estimated R800bn a year”.⁹¹

The government’s procurement budget now exceeds R1 trillion a year. In concluding procurement contracts, the state is generally expected to pay inflated prices to BEE “tenderpreneurs”, who have long been permitted to charge 11% more on contracts worth R50 million or more and an extra 25% on contracts below R50 million. In practice, BEE price inflation is often much greater, with R20 million charged for a school that should have cost R5 million and R940,000 for an oil storage container available for R80,000.⁹² The National Treasury does not disclose the total cost of these BEE “premiums”, whether these fall within the specified limits or are higher and thus illegal. However, this cost has been estimated at R150bn a year. BEE premiums are set to become even more costly and wasteful under the Public Procurement Act of 2024, which greatly expands the scope of BEE preferences (but is not yet in operation).⁹³

Damaging BEE rules have become major obstacles to investment, growth, and jobs, which has caused great harm to the great majority of poor black South Africans. By contrast, the benefits of BEE have gone largely to a small and often politically connected black elite. BEE has thus worsened inequality, which is now generally greater *within* the black population than between whites and blacks. This largely explains why the country’s Gini co-efficient has risen from 59 in 1994 to 63 in 2022.⁹⁴

State custodianship of all water resources

Under common-law rules, landowners have riparian and other rights to the water in rivers flowing through their land or located beneath it in underground streams.⁹⁵ In 1998, however, the National Water Act made the government the “public trustee” or “custodian” of all the country’s water resources. In the ANC’s view, the statute thereby extinguished all common-law water rights.⁹⁶ This meant that anyone wanting to use water had to apply to the Department of Water and Sanitation (DWS) for a “water-use licence”, which would remain in force for a maximum of 40 years and would be subject to review by the state at five-yearly intervals.⁹⁷

Agri SA, an organisation representing commercial farmers, objected that the Act had expropriated existing water rights without compensation, which was unconstitutional. But the government responded that the Act had merely brought about a “deprivation” of property, rather than an “expropriation” for which compensation would be payable. It also stressed that Section 25(1) of the Constitution allows for people to be deprived of their property, provided this is done via a law of general application and is not “arbitrary”.⁹⁸

Resistance to the change was defused by allowing farmers and other water users to retain their pre-1998 water usage while the new licensing system took effect. Agri SA thus decided not to litigate, and the government's argument was not put to the test.⁹⁹ Yet a "deprivation" of property normally arises, for example, where a court orders the demolition of a building erected in breach of building regulations. In this situation, there is no reason for the state to pay compensation since it gains nothing when the owner is deprived of his illegal building. Whether the same principle should apply to the state's taking of custodianship over valuable water rights is far from clear.

In issuing a water-use licence under the 1998 Act, or deciding on the allocation of water in a given area, the state must take into account all relevant factors, including the 11 listed in the statute. The need "to redress past racial and gender discrimination" is one listed factor. Others include the extent of "investments already made", the "socio-economic impact" of allowing or refusing the requested water use, and the importance of ensuring the "efficient and beneficial use of water in the public interest".¹⁰⁰

DWS officials are obliged to take all 11 factors into account in deciding on water-use licences. So too is the Water Tribunal created by the Act, which is charged with reviewing disputed decisions.¹⁰¹ In practice, however, both DWS officials and the Water Tribunal have tended to use race as the sole consideration in making these decisions. However, this approach is in conflict with the Act, as the Supreme Court of Appeal confirmed in 2012.¹⁰²

In a "National Water and Sanitation Master Plan" drawn up in 2018 and approved the following year, the DWS said it planned to amend the 1998 Act to "make equity the primary consideration in water allocation".¹⁰³ In November 2023 this amendment was included in a draft National Water Amendment Bill which was published for public comment over the festive season, when much of the country shuts down.¹⁰⁴ Once enacted, this Bill could also empower the minister to introduce regulations (as proposed earlier in 2023) that would require water users to "allocate shares to black people in the proportions stipulated" by the state. The proportions mooted ranged from 25% for relatively small water users to 75% for those taking or storing "up to 250,000 cubic metres".¹⁰⁵

The draft Bill and the mooted regulations have not yet been adopted. They nevertheless indicate how the government aims to use its custodial powers to enforce racial targets in the granting of water-use licences. This may also compel farmers and other big water users to do 75% ownership deals with BEE "investors" unlikely to have the capital or expertise needed for major farming, mining, and other enterprises.

State custodianship of mineral resources too

Soon after the National Water Act of 1998 was enacted, the Mineral and Petroleum Resources Development Act (MPRDA) of 2002 vested all mineral resources in the “custodianship” of the state. It also empowered the mining minister to develop a socio-economic empowerment charter for the sector, which set out additional ownership and other targets for mining companies to fulfil. Both the MPRDA and the mining charter came into effect on 1st May 2004.¹⁰⁶

Prior to the MPRDA, two thirds of mineral resources in South Africa were privately owned. These ownership rights were legally enforceable, had unlimited duration, and could freely be sold or otherwise disposed of. Under the 2002 Act, by contrast, all the country’s mineral resources became vested in the state’s custodianship, thereby extinguishing private ownership and achieving the NDR goal of “eliminating” property rights in this sphere.¹⁰⁷

Under the MPRDA, no compensation was paid to mining companies stripped of the ownership of their mineral resources. This seemed inconsistent with Section 25 of the Constitution, which states that expropriation must be accompanied by the payment of “just and equitable” compensation. But the Department of Mineral Resources (DMR), as it then was, denied that any expropriation had taken place – and the Constitutional Court found a way to support this perspective in a crucial judgment handed down in 2013 in the *Agri SA* case.

This case involved a company whose unused “old-order” coal mining right, bought for R1m before the MPRDA was enacted, had “ceased to exist” in 2005 under the provisions of the statute. Chief Justice Mogoeng Mogoeng found that the company had suffered a “compulsory deprivation” of its right – and that the “custodianship” of this right (and of “other mineral resources”) was now vested in the state. However, said Mogoeng, “the assumption of custodianship” did not amount to expropriation because it did not make the state the owner of the right in issue. Added the Chief Justice: “Whatever ‘custodian’ might mean, it does not mean that the state has acquired and thus become the owner of the rights concerned.” It followed that no expropriation had taken place – and hence no compensation was payable.¹⁰⁸ Though Mogoeng stressed that his decision was based solely on the facts of the case before him, the ANC sees his judgment as laying down a general legal principle that the taking of custodianship does not require compensation.¹⁰⁹

Since the MPRDA took effect in 2004, successive ministers have twice amended its accompanying mining charter to make its BEE obligations more costly and difficult to fulfil. However, there is nothing in the wording of the MPRDA that empowers them to make such changes.¹¹⁰

Under the initial 2004 mining charter (mining charter I), mining companies were expected to transfer 26% of their equity or assets to historically disadvantaged South Africans within ten years, so as to secure the conversion of their old-order mining rights to new-order ones. The document also stated that “the continuing consequences of all previous deals” were to be taken into account in measuring black ownership, so as to protect mining companies from having to do additional “top-up” deals whenever BEE investors sold out.¹¹¹

Under this initial charter, mining companies also agreed to various other empowerment goals, generally expressed in aspirational terms. They undertook, for example, to “aspire to a baseline” of 40% black participation in management within five years and “pledged” to increase their procurement from black companies by an unspecified amount.¹¹²

In 2010, however, a revised mining charter (mining charter II) unilaterally turned these aspirational targets into binding quotas, all of which had to be achieved by 2014.¹¹³ Failure to do so, said the new charter, would be “a breach” of the MPRDA and expose offenders to the cancellation of their mining rights.¹¹⁴

In 2018 yet another charter (mining charter III) repealed all earlier charters, thereby eliminating the “continuing consequences” principle and requiring companies to keep doing additional BEE deals at considerable cost. The new charter also raised the ownership requirement for new mining rights to 30% and stipulated that this 30% requirement would apply on the transfer or renewal of existing mining rights as well.¹¹⁵

The Minerals Council South Africa, which represents some 90% of mining companies, applied to court to have many of these new requirements set aside. In 2021 the Pretoria high court found in its favour, ruling that the mining minister was not “empowered to make law”. Hence, he could not repeal the “continuing consequences” principle or impose new obligations on mining companies.¹¹⁶ (The mining department plans to circumvent this judgment by amending the MPRDA to incorporate the clauses the high court has struck down, but no such bill has yet been put forward.)¹¹⁷

In 2002, before the MPRDA came into effect, South Africa attracted some 5% of global mining exploration expenditure: a significant sum. In 2020, however, said Paul Miller, a director of mining supply consultancy AmaranthCX, it “accounted for just 0.95% of the global total – a devastating statistic for what was once the greatest mining country on earth”.¹¹⁸ Exploration investment has since declined further, dropping to 0.8% of global spending in 2023.¹¹⁹

This decline in investment has primarily been fuelled by doubts about the security of mining titles, along with the ANC’s repeated endeavours to ratchet up empowerment obligations. As Miller puts it, South Africa’s mining industry has become “uninvestable” because the industry has already experienced major regulatory shifts under mining charters I, II, and III – and cannot predict what will be contained in “mining charters four, five and six”.¹²⁰

Expropriation without compensation for land and other property

NDR ideology has long identified land reform as a “wedge” issue that can be used to push for ever more state ownership or control of both land and other property. Since 1994 the ANC has thus been pursuing a land reform programme with three prongs: the restitution of land to those dispossessed of it under racial laws from 1913 onwards, the redistribution by 2030 of 30% of the 77.5 million hectares of farmland owned by whites in 1994, and the granting of legally secure title to those without this.¹²¹

The 30% target translated into some 23 million hectares of farmland, of which close on 19 million had been redistributed or restored by 2022.¹²² However, most transferred farms – between 50% and 90% of them – have fallen out of production or produce only at subsistence levels. What this means, writes journalist Stephan Hofstatter, is that the government, “by its own admission, has spent billions of rands in taxpayers’ money to take hundreds of farms out of production, costing thousands of jobs and billions more in lost revenue”.¹²³

The ANC’s emphasis on land reform brushes aside the views of ordinary black South Africans, few of whom see access to land as an important way to get ahead.¹²⁴ This helps explain why more than 90% of successful land restitution claimants have chosen cash compensation in lieu of the return of their land.¹²⁵ However, their preferences continue to be ignored by NDR ideologues with little interest in them.

The pivotal NDR objective was finally made clear at the ANC’s Nasrec national conference in 2017, when the ANC resolved that “the expropriation of land without compensation should be among the mechanisms available to give effect to land reform and redistribution”.¹²⁶ This goal was reaffirmed both at the SACP’s 15th national congress in July 2022 and at the ANC’s subsequent national conference in December 2022.¹²⁷

The 1996 Constitution permits expropriation not only “for public purposes” (the building of roads and dams) but also “in the public interest” (defined as “including the nation’s interest in land reform...[and] equitable access to all South Africa’s natural resources”). However, expropriation must be accompanied by the payment of “just and equitable compensation”, which reflects “an equitable balance” between the public interest and the interests of expropriated owners. What is just and equitable must either be agreed – or “approved or decided” by the courts – in the light of “all relevant circumstances”, including the market value of the property, its current use, and the history of its acquisition.¹²⁸

In 2021, following a lengthy and flawed process of public consultation, a parliamentary committee drew up a draft bill seeking to amend the Constitution to allow expropriation without compensation (EWC). This bill authorised “nil” compensation for land and “the improvements thereon” that were expropriated for land reform purposes in circumstances to be specified over time via new laws passed by Parliament. The bill also empowered the state to take custodianship of “certain” land, without defining this concept further.¹²⁹

The Economic Freedom Fighters (EFF) led by Julius Malema, a former president of the ANC Youth League, wanted state custodianship of “all” land. However, the ANC was concerned that this wording might alienate traditional leaders – vital in securing its rural vote – as well as some 9.75 million black families with home ownership. It thus declined to make this change.¹³⁰ The EFF then refused to support the bill, as did the DA and most other opposition parties. The measure failed to achieve the necessary two-thirds majority for amendments to the Bill of Rights (204 MPs out of 400 voted for it) and could not be adopted.¹³¹

The ANC nevertheless remains strongly committed to EWC. In January 2022 Ramaphosa stressed that “the expropriation of land without compensation” was still a key ANC objective, as the Nasrec national conference had resolved back in 2017. However, the EWC goal would now be achieved by “finalising legislation such as the Expropriation Bill”.¹³²

The Expropriation Act of 2024 was adopted by Parliament in March 2023 and signed into law in January 2025, without notice to the DA and other GNU parties. The Act expressly allows “nil” compensation for expropriated land in four listed circumstances. According to this list, nil compensation may be paid for unused land being held in the hope its value will increase, as well as for land which has supposedly been “abandoned” by owners who are failing to “exercise control” over it, despite being “reasonably capable of doing so”.¹³³ In a country where land invasions and building hijackings are rife – and generally go unchecked and unpunished – this last provision is particularly damaging as it could encourage land seizures as a precursor to EWC. In addition, the circumstances in which “nil” compensation may be paid are expressly “not limited” to the four listed in the Expropriation Act, making it impossible to tell how far nil compensation could in time extend.¹³⁴

The Expropriation Act also defines “expropriation” in a narrow way as the “compulsory acquisition” of property by the state. This definition harks back to the flawed Constitutional Court judgment in the *Agri SA* case in 2013 and is intended to ensure that the “assumption of custodianship” does not count as an expropriation or require the payment of compensation.¹³⁵

Most people assume that the EWC threat in the Expropriation Act stems primarily from the clauses authorising “nil” compensation for expropriated land. However, where some measure of compensation is indeed paid, it will generally be well below market value. Effectively, thus, expropriated owners will receive the equivalent of nil compensation for part of their assets and market value compensation for the remainder. In addition, there is a serious risk that the definition of expropriation in the Act will in time be used to exclude the payment of any compensation when farming, mining, or other land is vested in state custodianship under new statutes yet to be adopted.¹³⁶

Once the Act is brought into operation, further adverse consequences are likely to follow, as the Banking Association of South Africa (Basa) has repeatedly warned. According to Basa, South African banks have “extended R1.6 trillion in residential, commercial, and agricultural mortgages to borrowers”. If these bonded properties are expropriated or taken into the state’s custodianship for zero compensation, the mortgage debts in issue will still have to be paid off but most owners will lack the means to do so. Defaults will follow and property values will decline, often to the point where owners owe more on their mortgages than their properties are worth. This could affect the market value of all land-based property in South Africa (which Basa estimates at R7 trillion) and trigger a banking crisis.¹³⁷

Using the black working class as the “main motive force” of the NDR

The ANC has long identified the black working class, both employed and unemployed, as the “main motive force” of the revolution and (as the SACP puts it) “the decisive force to bring about...victory in the NDR as a stage towards building a socialist South Africa”.¹³⁸ All black workers, whether they have jobs or are unemployed, are thus equally important in advancing the revolution.

For those with jobs, an important NDR goal is to skew labour laws against employers and expand trade union power. Workers can then use this power to “confront the dominance of capitalism”, as the 2012 *Strategy & Tactics* document urges, and help “change the structure of the South African economy”, as the 2017 document adds.¹³⁹

Working class people who are unemployed or find themselves retrenched also have important roles to play in challenging what the SACP describes as “the barbarism of capitalist profit maximisation”.¹⁴⁰ Unemployed youths can be particularly helpful here as their “militancy” can be harnessed “in pursuit of national democratic and socialist tasks”, the party says.¹⁴¹

The ANC and its communist allies are careful not to acknowledge an NDR interest in pushing up the unemployment rate. However, they are surely well aware that widespread joblessness reduces domestic demand, limits economic growth, deepens destitution and anger, and adds to the revolutionary potential within the country.

The Labour Relations Act of 1995 makes it easy for workers to strike over unresolved disputes over wages and working conditions, generally on 48 hours’ notice to employers. It also allows secondary and sympathy strikes, along with stoppages and other protest actions aimed at advancing the broad “socio-economic interests” of workers. Employees may not be dismissed for taking part in protected strikes, while any dismissal for this reason is automatically regarded as legally unfair.¹⁴²

Major strikes sometimes persist for long periods (three to five months) and are commonly enforced via intimidation and sometimes killings. The most violent strike to date took place in 2006 and was implemented by a trade union allied to the ANC. During this three-month stoppage, 69 non-striking security guards were killed, many of them beaten, shot, or flung from moving trains. Cosatu general secretary Zwelinzima Vavi helped incite these attacks by calling for “the rats to be crushed”. However, neither he nor any other union member has been prosecuted or punished for these murders.¹⁴³

In 2017 various Labour Court judges identified “violence around strikes as a huge and growing problem”, as many strikers either ignored court orders prohibiting coercion or “trampled them” underfoot.¹⁴⁴ In 2021 a labour lawyer commented: “There is violence in most big strikes today because of the lack of law enforcement. Employers have little defence against violence and intimidation because of poor policing and the ineffective prosecution of people who commit crimes.”¹⁴⁵

The Labour Relations Act also makes it difficult to dismiss poorly performing workers, as all dismissals are automatically deemed unfair unless employers can prove that they were carried out for fair reasons and following fair procedures. Dismissed employees can easily claim reinstatement and/or significant damages from employers via a state-appointed Commission for Conciliation, Mediation, and Arbitration (CCMA). Employers are thus constantly at risk of being dragged before the CCMA on grounds that may be spurious but nevertheless take significant time, effort, and money to refute.¹⁴⁶

In recent years, entry-level wages have gone up sharply under the National Minimum Wage Act of 2018.¹⁴⁷ In 2019 the initial national minimum wage (NMW) was set at R20 an hour, but with lower amounts for farm workers (R18 an hour), domestic workers (R15 an hour) and people doing temporary work for the state under its Expanded Public Works Programme (R11 an hour).¹⁴⁸ By March 2022, however, the government had raised the NMW for all employees – including farm and domestic workers – to R23 an hour. In March 2025 the NMW was increased further to R28.79 an hour. This is a roughly 45% rise from the R20 figure introduced in 2019 and almost double the initial NMW for domestic workers. Only the people working temporarily for the state on public works programmes continue to receive considerably less, at R15.83 an hour in 2025.¹⁴⁹

Yet, even at its 2022 level of R23 an hour, the NMW was almost the same as the then median wage of R24 an hour. Since the median is the middle number in an ascending or descending set of numbers, this meant that close on half of all South African employees earned below the NMW. Commented IRR head of campaigns Gabriel Crouse: “The NMW has been set so high that almost 50% of employees now earn below the legal minimum, making their continued employment *illegal*... No country on earth has attempted to enforce such a high NMW-to-median wage ratio.”¹⁵⁰

This high NMW helps explain why unemployment among poorly schooled and often inexperienced youth is so extraordinarily severe. For those aged 15 to 24, the jobless rate is 62% on the official definition. On the expanded definition, which counts discouraged workers not actively seeking jobs, it stands at a staggering 70%.¹⁵¹ The overall unemployment rate, at 32.9% in December 2024 to March 2025, is one of the highest among 80 countries monitored by Bloomberg.¹⁵²

In a hobbled economy unable to generate jobs on anything like the scale required, people have become increasingly desperate for work. In 1999, for instance, the South African National Defence Force advertised 650 posts for which some 51,000 people applied.¹⁵³ In May 2017 the Johannesburg Metropolitan Police Department advertised 1,500 new posts and received what it described as a “staggering” 65,000 applications – a telling testament to the “vast” unemployment rate in the city.¹⁵⁴ In June 2023 Gauteng premier Panyaza Lesufi advertised 8,000 job vacancies across various provincial departments as part of his “Nasi Ispani” (isiZulu for “here is a job”) campaign and received an even more extraordinary 1.2 million applications.¹⁵⁵ (The Nasi Ispani initiative was terminated after the May 2024 election.)¹⁵⁶

Rising joblessness has added greatly to poverty and inequality. It also provides valuable grist to the NDR propaganda mill, for it can easily be used to support the false claim that the free market system is unable to lift people out of poverty. This claim can then be used to buttress demands for nationalisation and ever greater state control.

In 2018 the South African Federation of Trade Unions (Saftu), a federation now run by Vavi as general secretary, put it thus: “The system of monopoly capitalism has pauperised the working class, created the widest inequality in the world, and is now making the rich even richer and the poor even poorer... This crisis-ridden capitalist system has to be replaced by a new growth path based on the nationalisation of the mines, banks, and industrial monopolies and the building of a new democratic socialist order, in which the wealth created by the labour of the working class is owned, controlled, and shared by the working people and not a super-rich capitalist class.”¹⁵⁷

Costly and dysfunctional education

One of the most important tasks of any democratic government is to provide the best possible schooling and tertiary tuition for its youth. A government which fails in this crucial sphere should be voted out at the next election, which is the most effective sanction society can deploy. But this well-proven approach is anathema to the NDR and the ANC’s vision of itself as uniquely entitled to rule until a socialist system has been achieved.

Instead, the ANC seeks to promote the NDR by turning education at all levels, from primary to tertiary, into a justiciable socio-economic “right”.¹⁵⁸ The 1996 Constitution thus gives “everyone...the right to a basic education”. It also gives everyone the right to “further” (or tertiary) education, which the state must make “progressively available and accessible”.¹⁵⁹

However, the ANC has little interest in providing the country's youngsters with a solid grounding of knowledge and a strong capacity for critical analysis. Rather, it sees "the aim of education [as being] to teach the youth to love their people and their culture, and to honour human brotherhood, liberty, and peace"¹⁶⁰ This contradicts the goals of education in most Western democracies.

Access to schooling, particularly at the secondary level, has improved significantly since the political transition. However, little has been done to improve the quality of education. A key need was to upgrade the capacity of black teachers from the pre-1994 period by expanding their subject knowledge and improving their pedagogical skills. But the superficial training provided by the new government failed to address these needs – and left many teachers unable to understand or teach much of the curriculum.¹⁶¹

This problem has persisted among more recent entrants to the profession, who continue to come from poorly performing schools and are pushed through the teacher training process without much regard for how little they themselves have learnt. Commented education expert Professor Jonathan Jansen of the University of Stellenbosch in 2018: "A recent study found that at one university the final year teacher education students were functionally illiterate. These are the graduates who will be teaching pupils in schools and future students in universities."¹⁶²

Poor teaching has been compounded by the often-destructive role of the South African Democratic Teachers' Union (Sadtu), an important Cosatu affiliate. Sadtu has about 260,000 members – roughly two-thirds of all public-school teachers – and vigorously supports the NDR and its socialist objectives.¹⁶³ Sadtu has long resisted attempts to re-introduce teacher inspections and competency tests, conduct teacher training outside school hours, or link teacher pay to productivity.¹⁶⁴ Sadtu's power does much to explain why many teachers in township schools teach for only 3.5 hours a day (rather than the norm of 6.5 hours a day in suburban schools); why union meetings are often held during school hours; and why teachers are rarely disciplined or dismissed for misconduct.¹⁶⁵

In 2016 a task team appointed by basic education minister Angie Motshekga found that Sadtu had "captured" six of the country's nine provincial education departments. This control allowed it to decide on the appointments of many teachers, principals, and provincial education officials.¹⁶⁶ For many years, moreover, Sadtu used its control to run a "jobs-for-cash" racket, in terms of which people wanting appointment as principals in public schools had to pay union officials R30,000 or more to secure these prized and well-paid posts.¹⁶⁷

At least 80% of public schools are dysfunctional, failing to impart even as such basics as literacy and numeracy. Poor teaching is a major factor in dysfunctionality. So too is bad school management by ANC cadres deployed as school principals,¹⁶⁸ while inefficiency in provincial education departments is rife. In practice, many "no-fee" schools wait many months for the funding the government is supposed to transfer to them, making it difficult for them to function.¹⁶⁹

In 2021 the “Progress in International Reading Literacy Study” (PIRLS) found that 81% of South Africa’s Grade 4 pupils could not read for meaning in any language. This put the country last among 43 nations, many of which spend less on education than South Africa’s 6.5% or so of GDP.¹⁷⁰ Many South African pupils also do badly on the Trends in International Mathematics and Science Study (TIMMS). In 2017, 61% of Grade 5 pupils were unable to add and subtract whole numbers.¹⁷¹ In 2023, the latest TIMMS report ranked South Africa’s Grade 5 learners – who were largely assessed against Grade 4 learners from other countries – last in both mathematics and science among the 58 nations assessed.¹⁷²

Partly to compensate for inadequate teaching, the requirements for passing the matric exam – now called the National Senior Certificate (NSC) – have been set at a low level. Candidates must achieve 40% in three subjects and 30% in another three.¹⁷³ Effectively, this allows pupils to pass with a 35% average. Though this sets the bar very low, it remains unattainable for hundreds of thousands of youngsters who leave school each year without a matric certificate.¹⁷⁴

Though the matric pass rate is superficially satisfactory – it generally exceeds 75% and came in at 87% in 2024¹⁷⁵ – this discounts the high drop-out rate. It also overlooks the fact that school leavers who have passed the NSC are often so poorly skilled as to be effectively “untrainable”. In the words of businessman Simon Mantell, it has become ever harder to “find people with even basic cognitive skills. They come out of school and don’t know how to measure or keep time... There is a total lack of understanding of basic arithmetic...[and] they can’t read simple instructions... Most people I see looking for jobs don’t have the basic skills I need.”¹⁷⁶

Public schooling is widely seen as having deteriorated since the apartheid era. Writes veteran journalist Barney Mthomboti: “With no shortage of resources, fixing the education system could have been low-hanging fruit for a new government. But the ANC has made an absolute shambles of our education system. Education under an ANC government is producing students of a far poorer quality than education under apartheid.”¹⁷⁷

Socialising health services via the National Health Insurance proposal

The 1996 Constitution gives “everyone the right to have access to healthcare services, including reproductive health care”. The Constitution also requires the state to “take reasonable legislative and other measures, within its available resources, to achieve the progressive realisation” of this right.¹⁷⁸ This last clause – coupled with the NDR assumption that the right to healthcare applies horizontally and so binds the private sector as well as the state – is being used to drive a particularly important NDR intervention: the introduction of a National Health Insurance (NHI) system.

South Africa has long spent around 4.1% of GDP on public healthcare. This is more than many other emerging economies can manage and in line with healthcare spending in 55 other middle-income countries.¹⁷⁹ Yet, despite the best efforts of many dedicated professionals, the country gets little value for its substantial budget. Instead, as the *Financial Mail* has commented, the public healthcare system is a “dysfunctional” one, in which “the theft of resources, crippling inefficiency, and accountability-free hospitals are the order of the day”. This is not “a money problem”, but rather “a management one”.¹⁸⁰

This malaise has been compounded by the ANC’s insistence on cadre deployment, employment equity, and preferential BEE procurement. These interventions have stripped provincial health departments of experience and skills, put the management of public hospitals and clinics into the hands of “teachers, nurses, and even clerks with only a matric” (as the Development Bank of Southern Africa reported in 2011), eroded accountability, and promoted corruption.¹⁸¹ They have also contributed to persistent shortages of medicines and other essentials and high levels of medical negligence in public hospitals, often involving brain damage to new-born infants.¹⁸²

The country also has a world-class system of private healthcare, to which some 32% of its population (roughly 19 million people) have access through medical schemes, health insurance policies, and out-of-pocket payments. In the 2023/24 financial year, spending on private healthcare amounted to roughly R280bn, of which some R230bn went to medical schemes, R40bn to out-of-pocket purchases and the remainder to health insurance policies.¹⁸³

South Africa’s medical schemes thus play a vital part in providing access to private health services. The ANC has nevertheless greatly increased the costs of medical scheme membership by insisting, for example, that all medical schemes must “pay in full” for some 300 “prescribed minimum benefits” (PMBs), irrespective of whether members want this cover.¹⁸⁴ It has also barred the introduction of low-cost medical schemes (which it regards as “a stumbling block on the path” to the NHI),¹⁸⁵ curtailed affordable primary health insurance policies,¹⁸⁶ and removed most of the tax benefits that used to make medical aid far more affordable.¹⁸⁷ Without these NDR interventions, roughly 20 million more South Africans could already have gained access to private healthcare – and the burden on the public system would be much reduced.

The government refuses to acknowledge that its own policies have played a major part in raising private healthcare costs. Instead, the ANC has repeatedly stigmatised the private healthcare system as costly, selfish, and uncaring in its constant drive to put “profits before people”. Dr Manto Tshabalala-Msimang, minister of health under Mbeki, described the private healthcare system as “a ravenous monster that preys on our people”.¹⁸⁸ Her successor, Dr Aaron Motsoaledi (who was reappointed as health minister after the May 2024 election, after five years at home affairs), called it “a predatory... system where the sick and the vulnerable are the ones who get attacked”.¹⁸⁹

This stigmatisation has helped generate anger and resentment. It has also given more credibility to the ANC's oft-repeated claims that the only solution is to terminate the current "two-tier" system and introduce a single, state-run NHI behemoth. An NHI Bill was thus published for public comment in 2019 and adopted by Parliament in 2023. Ramaphosa signed it into law on 15 May 2024, shortly before the general election, but has not yet brought it into operation.¹⁹⁰

The ANC claims that the NHI system will reduce the costs of healthcare and provide all South Africans with "quality" health services that are free at the point of delivery. This will be achieved by paying all the monies needed to finance the system into an NHI Fund, which will function as "a single state-run medical aid plan", as Motsoaledi has put it.¹⁹¹

The NHI Fund will pay for all the health services to be provided to some 63 million South Africans¹⁹² by both public and private health professionals and facilities. However, its powers will be far greater than those of existing medical aids, for the NHI Fund will also decide on the health benefits to be provided, the fees to be paid to doctors and other practitioners, the medicines that may be prescribed, the blood tests to be allowed, the medical equipment to be used, the new health technologies to be permitted, and the prices to be paid for every item, from aspirins and antiretrovirals (ARVs) to sutures and CAT scanners.

The ANC has recently estimated the likely costs of the NHI at its start at between R480bn and R520bn a year, with R200bn a year in additional tax revenue needed to help finance it.¹⁹³ (For reference, the government expects to collect R2 trillion in tax revenue in 2025/26.)¹⁹⁴ Discovery Health, the largest open and private medical scheme in the country, has put the NHI's likely annual costs at the start at between R530bn and R860bn. It also estimates that raising an extra R200bn – assuming the ANC's figure is correct – would entail increasing the VAT rate to 21.5%, increasing personal income taxes by 32%, introducing a payroll tax at ten times current Unemployment Insurance Fund (UIF) contributions, or some combination of these three.¹⁹⁵ However, South Africa's tax-to-GDP ratio (the taxes it collects compared to the size of its economy) is already higher than the equivalent ratios in the US, South Korea, Ireland, Israel, and many other countries. In this situation, there is simply "no room to institute new taxes" to finance the NHI, as the *Financial Mail* has warned.¹⁹⁶

The number of health professionals available to provide NHI services is likely to diminish too, as many practitioners may emigrate rather than subject themselves to comprehensive and incompetent state control. In 2021 an opinion poll carried out by the South African Medical Association – an organisation representing some 12,000 doctors in public and private practice – found that 38% of its members planned to emigrate because of the NHI, while another 17% were considering doing so.¹⁹⁷

In addition, the enormous pot of revenue gathered together in the NHI Fund is sure to become a magnet for corruption, especially as all NHI procurement will be subject to BEE rules.¹⁹⁸ BEE procurement requirements have already become a favoured vehicle through which politically connected “tenderpreneurs” often double or triple market prices, even as they fail to deliver in full on promised goods or services.

Under the NHI, the country’s 70 or so remaining medical schemes will be squeezed out of existence. This will leave all South Africans with a single option on which to rely: the state-run NHI Fund. However, the state’s monopoly over healthcare is likely to be just as incompetent and corrupt as its monopoly over electricity, rail transport and ports.

The SACP has been threatening “war” against NHI critics from as far back as 2009, when its then general secretary, Blade Nzimande, warned “the capitalist classes...to prepare for a huge battle”, as “workers would meet capitalists in the streets...to fight” for the NHI.¹⁹⁹ The war-like rhetoric has since continued, the SACP saying in 2018 that it was “combat-ready...to take on the capitalist profiteers who benefit from the status quo...until the NHI is successfully implemented”.²⁰⁰

However, the real aim of the NHI is not to improve healthcare. Rather, it is to advance the NDR by “decommodifying” healthcare so that its “availability and price [are no longer] determined by a profit maximising capitalist market”, but instead decided by the government.²⁰¹ Other important goals are to expand dependency on the state – and establish the principle that private spending must be pooled with public revenues for the benefit of those in need.²⁰² This “pooling” concept is particularly important and, once entrenched in the context of the NHI, will be extended into other spheres, beginning with South Africa’s large pot of pension and other savings.

A mandatory state pension system and expanded social grants

The 1996 Constitution states that “everyone” has a right of access to “social security”, including “appropriate social assistance” for those “unable to support themselves and their dependants”. The state is obliged to “take reasonable legislative and other measures to achieve the progressive realisation” of this right, within the limits of its “available resources”.²⁰³

South Africa already has a sizeable public pension fund in the form of the Government Employees’ Pension Fund (GEPF). This is a “defined benefit” fund in which pension benefits are generally guaranteed by the state rather than dependent on investment returns. The GEPF has more than 1.2 million members, while its assets amounted to some R2.6 trillion in 2023.²⁰⁴ These assets are managed on behalf of the GEPF by another state-controlled entity, the Public Investment Corporation (PIC). (According to a judicial commission of inquiry, many of the PIC’s investment decisions have been characterised by “gross negligence”, a complete disregard for its investment processes, and “egregious violations of fiduciary duties by board members”).²⁰⁵

The country also has some 5,100 private sector pension funds with a combined membership of 17.7 million people and assets valued at some R4.4 trillion.²⁰⁶ These funds generally operate on a “defined contribution” basis, under which retirement benefits depend on contributions made, investment returns achieved, and management and other fees paid.

Since 2012 the ANC has been seeking to introduce a state-controlled National Social Security Fund (NSSF), similar in some ways to the NHI. Among other things, the NSSF will introduce a mandatory state pension scheme, along with a state-run “NSSF Default Fund” which will provide supplementary pension benefits to those with earnings above a stipulated level. According to a 2021 Green Paper (withdrawn shortly after publication), all employers and employees will be obliged to contribute 10% of their “qualifying earnings” to the NSSF. These contributions will be used to fund not only a mandatory state pension scheme but also death and disability benefits.²⁰⁷

Business warns, however, that “a costed” and “evidence-based” assessment of the NSSF proposal has yet to be provided.²⁰⁸ It also cautions that pension contributions will have to rise considerably to maintain the promised benefits, which will eat substantially into take-home pay.²⁰⁹ Most future pension contributions – and probably all accumulated pension savings, currently worth some R7 trillion – will in time be paid into the NSSF, while private pension schemes will largely cease to exist.²¹⁰ This will end the current “two-tier” system and “decommodify” social security, as the NDR script requires.

The NSSF will also assume responsibility for social grants. The government currently provides close on 19 million monthly cash grants, mainly in the form of child-support and old-age grants. Under a supposedly temporary scheme (recently extended to March 2026), it also pays out some 8.7 million “social relief of distress” (SRD) grants to adults with monthly incomes below the food poverty line (R796).²¹¹ The number of cash grants paid out each month thus totals nearly 27.7 million and is expected to cost the fiscus R422bn in the 2025/26 financial year.²¹² By contrast, only some 6 million individuals earn enough to be assessed for personal income tax (PIT), while 75% of the PIT collected comes from some 1.2 million people with annual incomes exceeding R500,000.²¹³

The Green Paper nevertheless proposed that the NSSF introduce a basic income grant (BIG) for the entire adult population aged 18 to 59. This would supplement, rather than replace, all existing grants other than the SRD one. It would begin at the food poverty level and cost some R200bn a year at its start. It could be funded via “a 10-percentage point increase on income taxes”, which the Green Paper claimed would have only “a slight” impact on “the wealthiest deciles”. Over time, moreover, the BIG would be increased to the upper bound poverty level (R1,300 a month) and, ideally, to R7,500 per person per month.²¹⁴

However, a BIG at the food poverty level would in fact cost R280bn a year, while one at the upper bound poverty level would cost some R600bn a year.²¹⁵ This is unaffordable, especially with gross public debt expected to rise to 78% of GDP in 2025/26. In addition, the country already stands uncomfortably close to a “fiscal cliff”: the point at which all tax revenues collected are spent on payments to civil servants, social grants, and debt servicing costs.²¹⁶

Social grants currently help millions of South Africans to survive, but are a poor substitute for the jobs and self-reliance almost 80% of South Africans would prefer (as shown by a 2023 IRR opinion poll). The grants have also increased dependence on the state and given the ANC a vital instrument of social and political control, especially at election times. As political analyst Moeletsi Mbeki has noted, ANC voters do not support the ruling party for ideological or policy reasons but “because of their material dependence on the ANC government”.²¹⁷

Part 4: An increasingly detrimental rather than developmental state

The NDR demands an ever more powerful “developmental” state to control the nation’s resources, “create the industrial...base for socialism”, roll back the capitalist market, put “social needs before private profits”, and ensure that all core goods and services are provided by the public service and SOEs rather than the private sector.²¹⁸

In practice, however, South Africa’s supposedly developmental state is becoming ever more detrimental to the country as efficiency plummets, corruption grows, wasteful spending soars, crime accelerates, and unchecked riots upend the social contract. The risk of repeat riots has at times also been used to try and push the South African Reserve Bank into abandoning conventional monetary policy and starting to print money instead.

Dysfunctional state entities and SOEs

A rigid insistence on cadre deployment, employment equity (EE), and BEE has denuded most state entities of experience and efficiency. Examples are legion: 80% of public schools are dysfunctional, failing adequately to impart even such basic skills as literacy and numeracy; roughly 80% of public clinics and hospitals cannot comply with basic healthcare norms and standards; some 87% of the free houses provided by the state are so badly constructed that many have to be rebuilt; billions of litres of untreated sewage pour into rivers and dams every day from failing municipal wastewater treatment plants; essential infrastructure cannot be expanded because the state (in the words of former finance minister Trevor Manuel) lacks “the capacity to get projects off the ground”; and vital financial controls cannot be maintained because inadequately skilled people have been appointed to crucial positions.²¹⁹

The malaise has accelerated in recent years. As DA leader John Steenhuisen noted in 2022: “The scale of the decay...is just staggering... Potholes, cracked pavements, litter, uncollected refuse, sewage spills, broken streetlights, broken traffic lights, dry taps, electricity sub-stations stripped bare, train stations carried off piece by piece, schools vandalised, hospitals only partly operational and long queues at clinics, police vehicles sitting unused and unusable at police stations.”²²⁰

The picture is similar at many SOEs, including the two most vital to the economy: Eskom, which has a virtual monopoly over electricity supply, and Transnet with its comprehensive control over the country’s rail network and ports.

Eskom, which generates some 90% of South Africa’s electricity, repeatedly plunged the country into worsening “load-shedding” or electricity blackouts between 2008 and March 2024. Loadshedding intensified dramatically in 2022 and 2023 as essential maintenance faltered, a vital new-build programme was further delayed, and corruption, theft and sabotage increased. The figures tell the story, for in 2021 the Gigawatt hours (GWh) that were shed totalled some 2,500, whereas in 2022 they rose to 8,300²²¹ before soaring to 16,000 in 2023.²²²

However, between March 2024 and January 2025, loadshedding unexpectedly ceased (while the stoppages implemented thus far in 2025 have been brief). The main factors contributing to the cessation of loadshedding in 2024 were diminished demand (from low economic growth and a 6,000MW increase in rooftop solar), more efficient procurement (from a greater use of original equipment manufacturers rather than BEE “tenderpreneurs”) and a significant increase in Eskom’s energy availability factor (from fewer unplanned outages and the return of broken or damaged units to production).²²³

NDR interventions are the main reason for Eskom’s declining performance over 15 years. Cadre deployment and EE appointments have deprived it of many of its skilled engineers, plant operators, and artisans,²²⁴ while much of its procurement has been tainted by BEE price inflation and corruption.²²⁵ BEE and EE have also hindered its new-build programme (the construction of two large coal-fired power stations at Medupi and Kusile), adding to delays and cost-overruns. Delivery on these stations is ten years’ late in general, while construction costs have soared from a contract price of R160bn for both stations to an estimated completion cost of R450bn, including interest payments and environmental modifications.²²⁶

According to former Eskom CEO André de Ruyter, who resigned in December 2022 after surviving an attempt to poison him at work, Eskom was also bedevilled by widespread looting. By the time he left, this was costing the SOE an estimated R1bn a month. It was also allegedly being driven by four sophisticated crime cartels, which bribed Eskom staff to sabotage equipment, hide supplies already in stock, sign off on non-existent deliveries, and enter into fraudulent procurement contracts backed by seemingly meticulous paperwork. Where necessary, they also used hitmen to ensure compliance with their demands. In De Ruyter’s view, the ANC was aware that Eskom had become “a feeding trough” for its cadres, but was reluctant to act against senior politicians implicated in the looting.²²⁷

Sabotage at Eskom also became a major issue. In 2019, for example, an overland coal conveyor at the Majuba power station caught fire shortly after two water valves needed to fight the flames had inexplicably been closed. In 2021 thick metal stays supporting an electricity pylon at Lethabo were cut and the pylon pushed over, stopping the coal feed to the plant. In May 2022 crucial cables were severed at the Hendrina and Tutuka coal plants,²²⁸ while the following month an extension cord was dropped into a transformer at the Matimba plant and tripped three units. Sabotage was also evident during an illegal strike at Eskom in July 2022, when much of the damage – the cutting of cables and throwing of switches to trigger generator blowouts – was done on-site by people with insider knowledge.²²⁹ How the many new managers brought in after De Ruyter's departure have succeeded in countering these seemingly intractable problems has yet to be explained.

Transnet, which has an almost complete monopoly over the country's rail network and ports, has also been badly damaged by cadre deployment, unrealistic EE requirements, and corrupt BEE procurement. It too has experienced an upsurge in vandalism and the theft of steel rails, wooden sleepers, and thousands of kilometres of copper cabling.²³⁰ According to Marius Bennett, head of security and forensics, the upsurge began in 2019 with a marked increase in the scale of looting operations.

These often involved 20 to 30 men with “considerable firepower...and acting with military precision”. Also new was “a level of deliberate sabotage”, in which stations were damaged but nothing was stolen.²³¹ Unprecedented too was the scale of some arson attacks, with 24 train carriages burnt out in Bloemfontein in a single incident in 2021.²³²

Transnet failures on both rail and ports have become endemic and are badly hurting South Africa's capacity to trade. The damage to bulk minerals exports has been particularly acute, as these contribute some 40% to the country's total export earnings. According to the Minerals Council South Africa, Transnet rail inefficiencies caused coal and iron ore export losses of R21bn in 2021, R49bn in 2022, and R27bn in 2023.²³³ Also in 2023, Transnet dysfunctionality reduced coal exports from Richards Bay Coal Terminal (with a design capacity of 91 million tonnes) to 48 million tonnes, the lowest figure since 1992.²³⁴

Spiralling state spending and public debt

The SACP has long castigated the National Treasury for its supposed “austerity”, but public spending has in fact risen very rapidly since 2009. This is partly because annual wage increases for public sector employees, despite poor performance, have long exceeded inflation by significant margins. At its peak, the public sector wage bill thus absorbed an astonishing 36% of all government spending. Despite attempts since 2020 to rein it in, it is set to consume 32% of total state spending in 2025 and will continue to crowd out spending in other critical areas.²³⁵ In addition, the overall public sector wage bill currently stands at 12% of GDP, as the World Bank has pointed out. This is 5 percentage points higher than the average in much wealthier countries belonging to the Organisation for Economic Cooperation and Development (OECD).²³⁶

SOE bailouts have long drained the public purse, with Eskom taking the lion's share. As Eskom's operating costs increased and its electricity generation flagged (some power stations were out of service 70% of the time during the worst of Eskom's loadshedding),²³⁷ its debt soared. Having stood at R40bn in 2009,²³⁸ Eskom's debt rose to a peak of nearly R640bn in 2020 before declining to around R410bn in 2024.²³⁹ Despite a massive 650% increase in electricity tariffs from 2007 to 2024 (against inflation of 129% over the same period),²⁴⁰ Eskom cannot generate enough revenue to cover both its debt-servicing costs and its often-inflated operating expenses.²⁴¹

The SOE thus relies on major government bailouts to remain a going concern. By February 2023, as *Business Day* reported, "taxpayers had forked out R263bn for Eskom bailouts", yet the risk of the SOE defaulting on its debt still remained high. In the 2023 budget, finance minister Enoch Godongwana announced that the government would assume R254bn (60%) of Eskom's debt by means of a subordinated loan, to be settled in Eskom shares rather than cash. This debt relief was to be provided in tranches over three years, while the government would also take over R70bn of Eskom's loan portfolio.²⁴² This promised debt relief was reduced by some R24bn in the March 2025 budget,²⁴³ now being revised, but its overall burden on taxpayers remains high.

Transnet's debt has risen to R138bn, while its debt service costs total R14.3bn a year.²⁴⁴ Transnet has been seeking R100bn in debt relief from the fiscus, but this has not been agreed. In 2024 the Treasury instead provided Transnet with R47bn in debt guarantees, so as to help it borrow the funds it needs.²⁴⁵ Over the past few years, significant bailouts have also gone to South African Airways (R51bn), the South African National Roads Agency Ltd (R24bn), and the South African Post Office (R8bn), among many others.²⁴⁶

Overall state spending since 2010 has gone up far faster than tax revenues or economic growth, which has averaged 1.3% a year over the past 15 years.²⁴⁷ Rising spending has thus largely been financed by escalating public debt. In 2009 public debt totalled R800bn (28% of GDP), but in 2023 it stood at R5.3 trillion (74.1% of GDP). It is now projected to exceed R6.8 trillion (75.1% of GDP) in 2027/28.²⁴⁸ Annual debt service costs have also risen fast, increasing from R180bn in 2018, when Ramaphosa became president, to R356bn in 2023 and a projected R479bn in 2027. More than R1.35 trillion is to be spent on debt service costs over the next three years, with much of these monies also needing to be borrowed.²⁴⁹

In 2020 Moody's Investors Service followed Fitch Ratings and S&P Global Ratings in downgrading South Africa's sovereign debt to non-investment or "junk" status.²⁵⁰ Moody's currently has the country at two notches into junk, while Fitch and S&P have it one notch lower.²⁵¹ When South Africa lost the last of its investment ratings, it was automatically excluded from the World Government Bond Index. This obliged many foreign investors to dispose of their South African bonds, deepening a sell-off which has reduced foreign holdings of government bonds from 43% in March 2018 to 25% in 2024.²⁵² Bond yields have risen too, increasing the government's debt service costs and adding to the damage from spiralling state debt.²⁵³

Intensifying lawlessness

Declining police capacity over many years has helped spark high levels of lawlessness, reflected in elevated murder rates, escalating extortion, and pervasive theft, vandalism and economic sabotage. In 2021 poor policing also contributed to the most destructive riots the country has ever known. Though the last quarter of 2024 saw a decline in murders, rapes, armed robberies and other serious crimes, the overall increase since 2020 remains considerable.²⁵⁴

Again, NDR interventions lie behind much of the malaise. After 1994 the South African Police Service (SAPS) was brought under ANC control under new policing laws, aided by cadre deployment and a focus on racial quotas at senior levels. Experienced white policemen were encouraged to resign, while black police officers with little practical knowledge were leapfrogged up the command chain. This led to a major loss of skills, institutional memory and morale.²⁵⁵

At the same time, the ANC pooh-poohed detective work and other traditional policing methods, dismissing them as “bandit catching”. It claimed that crime was the product of historical injustice and should be “prevented”, as the final Constitution said, by addressing its root causes.²⁵⁶ Crime prevention thus became the centrepiece of policy, even though the police could not overcome pervasive joblessness, substance abuse and family breakdown.²⁵⁷

Efficiency was further undermined in 2001, when some 500 specialised units were closed down and replaced by 50 new crime prevention units and 300 organised crime task teams. The following year a unit dedicated to countering corruption within the police was also disbanded, even though police corruption was increasing as discipline weakened and morale dropped.²⁵⁸

In 2010 Jackie Selebi, a deployed ANC cadre appointed as the country’s first black national police commissioner, was convicted of corruption. He had strenuously denied having taken bribes from convicted drug dealer Glenn Agliotti – whom he described as “my friend, finish and klaar” – but Agliotti testified, during Selebi’s trial, to having given the police commissioner some R120,000 in envelopes stuffed full of cash. Selebi was sentenced to 15 years’ imprisonment but was released on medical parole within less than a year. (He died some three years later).²⁵⁹

Police criminality soon extended way beyond corruption to include theft, murder, rape, torture, and assault. Yet police officers charged with serious crimes of this kind were often allowed to continue in their jobs pending trial, without being suspended or subjected to disciplinary action.²⁶⁰

With the police distracted by “transformation”, South Africa became increasingly attractive to criminal syndicates from Russia, China, Nigeria and elsewhere. These syndicates forged links with local gangs and began using the country as a new portal in the global drugs trade. Many syndicates also became involved in bank robberies, cash-in-transit heists, and the hijacking of cars and trucks. Often their members were more skilled and efficient than the police.²⁶¹

South Africa’s murder rate, at 44 per 100,000 in 2023/24,²⁶² is one of the highest in the world.²⁶³ Part of the reason lies in a low murder detection rate, currently standing at 12.8%.²⁶⁴ This stems from a general lack of skills and accountability within the police, compounded by bad management, poor training, and the absence of a professional intelligence arm able to predict and counter the actions of organised criminal networks.²⁶⁵

Extortion intensified after 2017, when new preferential procurement rules provided that all state tenders worth R30m or more had to incorporate a 30% sub-contract for BEE firms. This encouraged the rise of the “construction mafia”: armed groups that invade building sites and demand their 30% “share” of construction contracts, often at gunpoint.²⁶⁶

In 2018 construction company Aveng and its joint venture partner, Strabag International GmbH, were prevented from working on the R1.6bn Mtentu Bridge project in the Eastern Cape by groups wielding AK-47 assault rifles. After 80 days of this enforced stoppage, the companies invoked a *force majeure* clause and terminated their construction contract with the South African National Roads Agency Ltd. Commented Aveng’s chief executive Sean Flanagan: “Our German partners say they have worked in 80 countries, including Afghanistan and Iraq (Baghdad), but have never experienced anything like this.”²⁶⁷

By 2019 more than 180 construction projects, cumulatively worth more than R63bn, had been disrupted in this way. Ramaphosa promised to establish a designated police unit to eradicate the construction mafia, but little has been achieved.²⁶⁸ Construction companies have secured more than 50 interdicts against intimidation and violence, but the police have generally failed to enforce them. In practice, many businesses have thus been compelled either to abandon proposed projects or to acquiesce in the extortion.²⁶⁹

Road transport has also come under siege in recent years, especially on the crucial N3 highway linking Durban and Johannesburg.²⁷⁰ According to the Road Freight Association, more than 1,300 trucks were attacked, looted, damaged, and often destroyed in arson attacks during 2019 and 2020. In addition, at least 21 truck drivers and crew members were killed in this period.²⁷¹

Truck blockades on the N3 persisted thereafter. In July 2022, for instance, 200 trucks participated in a blockage that halted all traffic for three days at an estimated cost to the economy of some R300m. Smaller roads were also blocked, making it difficult to find alternative routes and generating vehicle queues that stretched for many kilometres. The police claimed there was little they could do as truck drivers had disappeared and taken their keys with them.²⁷²

Another 250 or so trucks were also destroyed in 2021 (often again on the N3 highway) in a sudden outbreak of rioting which began on 8 July.²⁷³ These riots – the most destructive disturbances ever witnessed in South Africa – were sparked by a Constitutional Court ruling committing Zuma to prison for 15 months for contempt of court. (Zuma had disregarded the Constitutional Court’s earlier instruction that he testify before the Zondo commission of inquiry into state capture.)²⁷⁴

Zuma’s supporters had long warned that any attempt to punish him in this way would “inevitably lead to social instability”. Hundreds of protesters thus gathered at Zuma’s Nkandla homestead when the court gave the former president five days to start his prison sentence or face arrest.²⁷⁵ Zuma sought to whip up public sympathy by claiming that he was being detained without trial, just as in the apartheid era. He nevertheless voluntarily surrendered to the police shortly before the expiry of the court deadline and was admitted to the hospital wing of the prison in Estcourt, a town on the N3 north of Pietermaritzburg.²⁷⁶

Sporadic protests began on Thursday 8 July, the first day of Zuma’s prison term. They escalated late the following night when mobs torched 30 trucks at the Mooi River toll plaza on the N3 and then swept into the town, where they attacked and looted shops. The truck burnings forced the complete closure of the N3, while other major roads around Durban were similarly blocked.²⁷⁷

The unexpected attack on shops in Mooi River, which the police failed to stop, was soon followed by massive waves of looting and arson which targeted liquor stores, shops, malls, warehouses, and bank ATMs, mainly in Durban but also in other parts of KwaZulu-Natal and later in Gauteng.²⁷⁸ In the words of political analysts James Myburgh and the late Jeremy Gordin: “All the shopping malls in Pietermaritzburg, many of the malls in Durban’s less affluent areas, and a number in Soweto were looted and badly wrecked. In Durban, food storage and other warehouses were also...attacked and looted.”²⁷⁹

Often the police stood by, making little attempt to end the mayhem. In Soweto and elsewhere, taxi drivers organised to ward off yet more assaults on shopping centres, while in many riot-torn areas communities banded together to protect their families, homes, and businesses.²⁸⁰

The riots petered out after some eight days without the police or army having ever acted decisively to curb them.²⁸¹ By then, 359 people had died, while damage to property and other economic losses was estimated at some R70bn.²⁸² According to journalist Rebecca Davis, some of those killed were “crushed to death in looted supermarkets under the weight of dislodged boxes of alcohol and huge hunks of frozen meat, [while others] were burnt alive after becoming trapped in buildings set on fire... [Many] died agonisingly, gasping for breath, after being trampled underfoot by crowds stampeding to access shops... Some were murdered by criminals while making their way home with stolen loot”.²⁸³

At Ramaphosa’s request, an official report on the riots, entitled the *Report of the Expert Panel into the July 2021 Civil Unrest*, was drawn up in November 2021. The report indicated that the riots had been sparked by “pro-Zuma politicking” but highlighted several other contributory factors. These included high levels of unemployment, poverty and inequality, compounded by public frustration at corruption and the prolonged Covid-19 lockdown.²⁸⁴

The report queried why warnings of imminent violence over Zuma’s imprisonment had gone unheeded by the intelligence services – and why the police had been so signally unprepared. It said that “people had felt abandoned by the state during the violence”, mainly because “the police were simply not up to the task of protecting the public.” Even the police admitted that “they were hopelessly outnumbered and outmanoeuvred, and could not keep pace with the fast-moving, dynamic, and dangerous conditions”.²⁸⁵

According to the Durban Chamber of Commerce and Industry (DCCI), the July 2021 riots had “a shattering impact” on the private sector in the eThekweni area. Recovery proved difficult for many businesses already battered by load-shedding, rail transport woes, the construction mafia and persistent blockages on the N3. Most debilitating, however, was a widespread belief that the riots would recur. Many entrepreneurs saw this as “inevitable” – especially as so little was done to hold the instigators to account.²⁸⁶

At the same time, many NDR proponents began using the fears sparked by the riots to push for yet more damaging interventions. The EFF warned that the July 2021 riots would “look like a picnic” if the ANC continued to drag its heels on land expropriation without compensation.²⁸⁷ Trade union federation Saftu claimed that the country was “sitting right on top of a powder keg, a ticking time bomb” – and that the government would have to spend at least R1 trillion on social welfare to “avoid a calamity”.²⁸⁸ Said Saftu general secretary Zwelinzima Vavi: “Do we want to wait for the powder keg to explode or do we act now?” The only solution, he asserted, was to “end austerity programmes,...introduce a R1,500 Basic Income Grant (BIG),...and lower... interest rates [as well as] the prices of food and fuel... It’s time to stand up and unite to force a change.”²⁸⁹

Pressure for loose monetary policy

Part of the change that Saftu wanted to “force” was to shift the South African Reserve Bank (SARB) away from conventional monetary policy and encourage it to start printing money if this was needed to finance the further stages of the NDR.

For many years the SARB has resisted NDR pressures and focused instead (as the Constitution requires) on “protecting the value of the currency in the interest of balanced and sustainable economic growth”.²⁹⁰ In 2000 the SARB adopted an inflation-targeting strategy under which it seeks to keep the annual consumer inflation rate within a range of 3% to 6%.²⁹¹ According to SARB governor Lesetja Kganyago, this strategy has provided an effective way of fulfilling the Bank’s constitutional mandate and maintaining its operational independence.²⁹²

Inflation targeting has also kept annual inflation rates at 5.5% on average over the past 24 years, which is far below the high inflation rates (12% or more) often evident in the 1980s and 1990s.²⁹³ The strategy has thus kept inflation expectations low and helped create the economic stability essential to investment and growth. “This is the clearest and most effective way the central bank can help the economy achieve full employment”, says Kganyago.²⁹⁴

In 2012, however, the ANC resolved that “South Africa requires a flexible monetary policy regime, aligned with the objectives of the second phase of the transition”.²⁹⁵ It reiterated this decision in 2017, while resolving that “the Reserve Bank should be 100% owned by the state”. (This would end its current ownership by 650 private shareholders, none of whom has any role in setting monetary policy.)²⁹⁶ In 2022 the ANC again endorsed both these decisions, albeit in more ambiguous terms.²⁹⁷

Why does the ANC want the mandate of the SARB changed? Its allies in Cosatu and the SACP have often spoken of wanting “very low interest rates” to stimulate growth and employment and so assist “the poor and small businesses”.²⁹⁸ More recently, the SACP has stressed that the main objective is to stop “neo-liberal” monetary policy from standing in the way of increased state spending on the NHI system, the NSSF, a universal basic income grant (BIG), free tertiary education, mass public employment, “a major infrastructure build”, a comprehensive programme of “state-led (re)industrialisation” and “a just green transition”.²⁹⁹ All these interventions are necessary, says the SACP, and none should be held back by the current mantra of the government having to cut back on spending and “make difficult trade-offs”.³⁰⁰

The SACP agrees that “not everything can be done at once” and says it is not suggesting that the SARB “simply churn out any amount of money regardless”. But the party nevertheless assumes that the Bank can “print” or “electronically inject” massive amounts of money into the financial system with nothing but benign effects, provided the spending thus made possible is “socially transformative”.³⁰¹

Duma Gqubule of the Social Policy Initiative has long been an outspoken proponent of modern monetary theory (MMT). According to Gqubule, “governments that control their currencies are not like households. They do not have to tax or borrow before they can spend, as they create the money they spend”.³⁰² MMT, says Gqubule, is rightly seen as “the magic money tree”.³⁰³

After the July 2021 riots, Gqubule redoubled his calls for a shift to MMT in South Africa. According to Gqubule, since South Africa prints its own money in its own currency, it can simply follow the example of the US and “create out of nothing” the money it needs for a basic income grant (BIG) and other pressing social needs. Hence, the key question is not whether the country can afford a BIG, but rather “can we afford not to implement the BIG”?³⁰⁴

Kganyago is likely to keep resisting NDR pressures of this kind, while his term of office was extended in November 2024 for a second five-year period.³⁰⁵ However, once his leadership ends, there is a significantly greater risk that the SARB might embark on quantitative easing or the outright printing of money. This in turn could trigger hyperinflation and economic collapse, further crippling the capitalist economy and paving the way for the final shift to a socialist system.

Conclusion: A growing NDR risk still not adequately understood

When the Berlin Wall came down in 1989 and the Soviet Union collapsed two years later, many people assumed that socialism had been so discredited that it could never rise again. Instead, many Left-leaning analysts – along with more than a hundred socialist parties still in operation – were quick to discount the massive repression, inefficiency, and corruption in the Soviet Union and elsewhere. They denied that socialism had failed, claiming instead that “real” socialism had never been tried.³⁰⁶

Joe Slovo, chairman of the SACP, was one of the first to put forward this perspective. In an article in late 1989, asking “Has Socialism Failed?”, Slovo swiftly concluded that it had not. Socialism in the Soviet Union had become too “commandist and bureaucratic”, he said, but this was an implementation error and had little to do with socialism’s intrinsic value.³⁰⁷

According to Slovo, socialism is supposed to be a highly democratic system in which people have a real say “not only in the production of social wealth but also in its disposal”. But the Soviet Union had instead adopted “a bureaucratic-authoritarian style of leadership...which concentrated power in the hands of a tiny, self-perpetuating elite”. However, this aberration did not detract from socialism’s importance. On the contrary, it simply confirmed that real socialism had never even been attempted.³⁰⁸



This argument has since been repeated by many others³⁰⁹ and has gained increasing traction over the past 30 years. This is partly because memories of the roughly 94 million deaths recorded by the *Black Book of Communism* in the Soviet Union, China, Cambodia, North Korea, Vietnam and other socialist countries have faded over the years.³¹⁰ At the same time, the free-market system has increasingly been derided for promoting massive inequality, putting profits before people, and destroying the environment in its blind pursuit of economic growth.

Support for socialism has grown strongly in many Western democracies, especially among young people. In 2022, according to an opinion poll conducted by a Canadian thinktank, the Fraser Institute, the proportion of young people aged 18-24 who saw socialism as “the ideal economic system” stood at 53% in Australia, 50% in Canada, 52% in the United Kingdom and 45% in the United States.³¹¹ In 2021 a Gallup poll showed that 60% of Americans favoured capitalism, but 65% of Democrats (up from 52% in 2010) had a positive image of socialism.³¹² These changing attitudes are helpful to the ANC/SACP alliance in their determined pursuit of a socialist future for South Africa.

Also important is the extent to which the media and other commentators conceal or play down the NDR and its socialist goal. The NDR thus remains invisible to most South Africans, despite its enormous importance – and even though the ideology provides the key to understanding developments in South Africa since 1994.

The NDR provides crucial insights into the ANC’s thinking, which otherwise remains baffling to most people. With growth stalling, joblessness long at crisis levels, and governance largely unravelling, most observers find it inexplicable that the ANC does not see the damage being done and urgently embark on business-friendly reforms. Understand the NDR’s socialist goal, however, and the ANC’s underlying priorities become far clearer.

From an NDR perspective, the capitalist economy must be broken and largely destroyed if a shift to socialism is to be achieved. Viewed through an NDR lens, rising unemployment and worsening poverty rates are thus marks of “progress” and “success”. So too are company failures and the slow collapse of the electricity, transport, and water logistics on which the private sector depends. Equally important is the erosion of business autonomy on crucial issues ranging from salaries and staff appointments to board and management positions, procurement contracts, ownership rights, investment decisions, and the prices to be charged for goods and services. In the end, business will be trussed up in so many reams of destructive red tape that its confidence, competitiveness, and capacity to operate will wither away.

Vital too from an NDR perspective is the steady roll out of supposedly “free” goods and services – as these help “delink” people from the capitalist economy and increase their dependency on what the government provides. In keeping with the Cloward-Piven strategy to bankrupt the state via socio-economic “rights”, ever more costly entitlements for ever more people, including non-citizens, are also essential.

These entitlements – most of which are already in place or soon to be introduced – range from free basic electricity and water to monthly cash grants, free housing, free schooling and tertiary education for most people, free healthcare for all, compulsory state pensions, and virtually free life and disability insurance. The costs of all these entitlements has already put enormous pressure on the public purse and will continue to do so. In time, this could help unleash a sovereign debt and related banking crisis that would further hamstring the capitalist economy.

At the same time, the NDR requires that state ownership or control must gradually expand. Much has already been done to secure or to pave the way for state custodianship over water, mineral, and land resources, and to empower the state to take ownership of other types of property for generally inadequate compensation. These interventions are likely to be followed in due course by the confiscation of assets ranging from mines and mining rights to accumulated pension, bank, life insurance, and other savings. Also in the NDR's crosshairs are private schools, private hospitals, medical schemes and their reserves, and majority stakes in companies both big and small.

Equally important to the NDR is the gradual erosion of constitutional checks and balances on executive power. Much has been achieved here too, from the entrenchment of legislative subservience to the executive to the undermining of judicial independence. Cadre deployment has blurred the separation of party from state and created a system of “dual authority” in which the ANC leadership ranks above both Parliament and the Constitution in the eyes of party loyalists. Cadre deployment has also given the ruling party extensive influence over “levers of power” ranging from universities and the public broadcaster to organised business and much of civil society.

Though media freedom remains outwardly intact, it is seldom used to highlight the most important issue of all – the steady advance of the NDR.

In the 2024 general election, anger at government incompetence and corruption saw the ANC's share of the national vote drop from 57% to 40%. In response, the ANC entered into a GNU with the DA and eight other parties. Though this has provided some cause for hope, there is little reason for complacency. As earlier outlined, the ANC quickly broke its agreement with the DA (which required that cabinet seats be allocated in keeping with seats won) by reserving some 65% of cabinet ministries for itself and granting the DA only 18%. Yet the ANC had won a mere 40% of these seats, while the DA had won 22%.

More seriously still, the ANC remains committed to implementing the NDR and sees the GNU primarily as a mechanism – similar to Lenin's New Economic Policy (NEP) in 1921 – to help it achieve its revolutionary goals. The NEP was introduced in the Soviet Union in 1921 to prevent a mass peasant rebellion and stabilise a failing economy. To help achieve these goals, the Communist Party of the Soviet Union (CPSU) claimed to be moving away from socialism. It said it wanted a free-market system under state control, with socialised state enterprises operating on a for-profit basis.

NEP reforms and reassurances were effective in increasing private sector investment, raising the growth rate, stimulating competition and reducing inflation. These gains helped revive the economy and lay the foundation for faster industrialisation. Once enough had been achieved, the NEP was jettisoned in 1928 and the shift to socialism continued.³¹³

That the ANC sees the GNU as an NEP equivalent is apparent from what Mmamoloko Kubayi, then human settlements minister, wrote in the *Sunday Times* in August 2024 under the title “A strategic retreat by the ANC to advance its cause”. Here Kubayi explained: “The [NEP] example demonstrate[s] that entering a political coalition with political opponents for a specific purpose is not anathema in carrying out a revolution.”³¹⁴

In the words of constitutional jurist Koos Malan, Kubayi’s analysis shows the ANC is using the GNU to “make a strategic retreat to enable future advances. It still aims to destroy the DA and to bring the private sector and civil society to heel under its totalitarian control”.³¹⁵

Continued ANC dominance under the guise of the GNU is likely to witness the introduction of many more NDR interventions. To begin with, the ANC may be able to prevail on many of the smaller parties in the GNU to support additional NDR policies, including the establishment of a new Transformation Fund into which larger enterprises will be obliged to pay 3% of their net profit every year to help BEE businesses.³¹⁶ In addition, many of the ANC’s ministers will be able to use their regulatory powers to flesh out framework statutes – on EE and preferential procurement, for example – with many harmful ancillary rules.

At the same time, there are already so many NDR laws on the Statute Book that the NDR is sure to keep doing its damage even without any additional interventions. So long as current NDR laws remain in place, South Africa will battle to attract fixed investment, push up the growth rate, or counter the unemployment crisis. In this situation, the free-market economy will continue to limp along – while the alternative “remedy” of expanding state control and citizen dependency may increasingly be seen as the only viable option.

The best way to defeat the NDR is to halt its further advance and then start rolling it back with singular determination and considerable speed. What the GNU needs to do, in an echo of President Javier Milei’s actions in Argentina, is to take a chainsaw to the thicket of NDR rules the ANC has already imposed on the country. Sadly, the ANC has so structured the GNU that the coalition government – on which so many South Africans are relying to rescue the country from its growing malaise – has little prospect of attempting this, let alone achieving it.

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South African Institute of Race Relations

www.irr.org.za

info@irr.org.za

(011) 482 7221
