



## COMMISSION: ECONOMIC TRANSFORMATION COMMITTEE

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**The year of Renewal to make the ANC a more effective instrument of the people to achieve the vision of the Freedom Charter:  
The people shall govern! The people shall share in the country's wealth!**



# Macroeconomic Context

- **Fragile but improving growth:**

Since 2022, the economy has remained in positive but low gear – real GDP grew by 1.9% in 2022 and 0.6% in 2023, with four consecutive quarterly expansions in 2025 (Q3 2025 GDP up 0.5%), signalling a slow move away from stagnation but still well below our transformative targets.

- **Stubborn unemployment, especially among the youth:**

The official unemployment rate fell to 31.9% in Q3 2025, but remains structurally high; youth unemployment (15–24) is still around 58.5%, and more than 13.3 million people are under-utilised in the labour market.

- **Rising cost-of-living pressure on the motive forces:**

The Competition Commission's 2025 cost-of-living work shows the poorest households spend over 40% of income on food and more than a quarter on housing and utilities; electricity tariffs up 68% and water 50% over five years, with transport and interest-rate hikes further eroding real wages, savings and household resilience.

# Structure of the Economy, Spatial Concentration and Fixed Investment

- **A concentrated and spatially uneven economy:**

Economic power remains concentrated in a small number of dominant firms and conglomerates, while apartheid spatial patterns persist: township and rural areas remain distant from jobs, markets and infrastructure, weakening inclusive growth and deepening regional inequality.

- **De-industrialisation and GFCF underperformance:**

Manufacturing and core value chains (steel, autos, metals, agro-processing) face high energy costs, logistics failures and import surges, driving de-industrialisation risk and job losses. Gross fixed capital formation remains stuck around 14–15% of GDP, far below the 25–30% needed to sustain a developmental growth path.

- **Network industries as both constraint and lever:**

Failures in energy, freight rail and ports have been a central drag on output, exports and employment. At the same time, the work to stabilise electricity generation, rebuild logistics and crowd in private investment in infrastructure is beginning to turn these sectors into levers for re-industrialisation and regional integration, as reflected in the ETC's 10-Point Plan.

- **Spatial concentration and livelihoods:**

The combined effect of concentration, low investment and spatial exclusion has been to trap millions in low-productivity, high-cost local economies – precisely why the ANC's programme emphasises industrial parks, SEZs, townships and rural nodes as sites of new fixed investment and ownership transformation.

# Global Shocks, Multilateralism, Ratings and the Road Ahead

- **Tariff wars and Trump-era shocks:**

The global order has shifted from “rules-based multilateralism” to strategic protectionism. The United States has revived Section 232 tariffs, including 25–30% duties on vehicles, parts and citrus, with an additional 10% threat on BRICS exports. This directly threatens jobs in autos, metals and agriculture – sectors central to our re-industrialisation strategy.

- **WTO crisis and the struggle for multilateralism:**

Paralysis in the WTO dispute-settlement system and slow reform undermine predictable market access for a small, open economy such as South Africa, making AfCFTA, BRICS+ and South–South alliances essential platforms to defend policy space and industrialisation in line with ANC resolutions.

- **Exit from the FATF grey list:**

On 24 October 2025, South Africa was delisted from the FATF grey list, after 32 months of reforms to strengthen anti-money-laundering and counter-terrorist-financing systems. This reduces our risk premium, improves access to global finance and supports a lower cost of capital for both the state and productive sectors, easing pressure on citizens and firms over time.

- **S&P credit rating upgrade:**

On 14 November 2025, S&P Global Ratings upgraded South Africa’s foreign-currency rating to BB (from BB-) and local-currency to BB+ (from BB), with a positive outlook – the first sovereign upgrade by a major agency in over 16 years. This is an explicit recognition of progress in stabilising the fiscus, fixing energy and logistics, and implementing structural reforms championed in the ANC’s 10-Point Plan.

# Midterm Report

- This Midterm Progress Report of the ETC is anchored on the 55th National Conference Resolutions, which remain the strategic compass of our work, and from the 2024 Elections Manifesto, which conveys our social contract with the people of South Africa.
- The report provides a consolidated account of implementation across departments and entities under the ETC's political oversight. It reflects the work undertaken to advance economic transformation, inclusive growth, and a capable developmental state.
- Where no progress is recorded, this is due to the ETC not receiving a submission from the relevant department or entity, by the of consolidation. However, the relevant comrades will be able to elaborate on those areas within this commission.
- For coherence and clarity, all resolutions and manifesto commitments have been clustered into key policy areas, enabling a structured assessment and discussion of progress, gaps, and areas requiring heightened political attention by this commission.

**Energy Security  
& Just Energy  
Transition**

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*Restore energy security urgently; develop a just energy transition path focused on communities; Eskom to play a strategic role; upgrade transmission; demand-side measures; consider emergency provisions; restructure Eskom debt.*

*“Fix energy” and implement a developmental Just Energy Transition; invest in transmission & distribution; promote cheaper solar; protect poor and vulnerable from price shocks.*

**1. Restoring Energy Security**

- Energy supply has stabilised significantly, marking a turning point after years of load-shedding.
- Updated **Integrated Resource Plan (IRP 2025)** introduces a balanced mix of renewables, gas, nuclear, hydro and cleaner coal technologies to ensure dependable baseload and system flexibility.
- Repurposing older coal plants (Komati, Hendrina, Grootvlei) through **BOOT models** reduces capital burden by ±35% and brings cleaner capacity online faster.

**2. Transmission Expansion**

- The **National Transmission Company of South Africa** has appointed **19 contractors** for a **R32 billion**, eight-year grid build programme.
- South Africa has confirmed **local manufacturing capacity** for towers, insulators and hardware; dtic designations ensure maximum local content in the grid rollout.
- Transmission modernisation is being aligned with successive procurement windows to unlock private-sector investment and improve grid access for new generation.

**3. Demand-Side & Distribution Reforms**

- Updated designations for **pylons, powerline hardware and substation structures** support local manufacturing and reduce imports.
- **Smart meter rollout** (6.2 million by 2029) will curb theft, reduce transformer failures and eliminate load reduction by 2027.
- Municipal distribution reforms (Distribution Agency Agreements) begin to address debt, billing failures, high losses and infrastructure backlogs.

Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
<b>Energy Security &amp; Just Energy Transition (continued)</b>		
<p><i>Restore energy security urgently; develop a just energy transition path focused on communities; Eskom to play a strategic role; upgrade transmission; demand-side measures; consider emergency provisions; restructure Eskom debt.</i></p>	<p><i>“Fix energy” and implement a developmental Just Energy Transition; invest in transmission &amp; distribution; promote cheaper solar; protect poor and vulnerable from price shocks.</i></p>	<p><b>4. Pricing &amp; Cost Reforms</b></p> <ul style="list-style-type: none"> <li>A review of the <b>Electricity Pricing Policy</b> is underway, with completion targeted for 2026.</li> <li>The reform will create predictable industrial tariffs, reduce administered-price shocks, and contain annual electricity increases to <b>CPI-level inflation</b>, protecting households.</li> <li>A dedicated renewable electricity procurement programme is being designed for energy-intensive industries (e.g., smelters) to secure lower-cost power over long-term contracts.</li> </ul> <p><b>5. Community-Focused</b></p> <ul style="list-style-type: none"> <li>Expansion of <b>Free Basic Electricity</b> is underway to close the gap between the 485k households currently receiving support and the ±2.1m eligible.</li> <li>The <b>Universal Access Action Plan</b> aims to address the 1.6 million-household electrification backlog through grid extensions, micro-grids and solar home systems.</li> <li>Total funding requirement for universal access is estimated at <b>R75 billion</b>, with new blended-finance models being prepared.</li> </ul> <p><b>6. Emergency &amp; Short-Term Measures</b></p> <ul style="list-style-type: none"> <li>Load Reduction affecting 1.69m customers is treated as a last-resort measure; an eradication plan is in place (smart meters, feeder upgrades, anti-theft measures).</li> <li>Clean-coal retrofit options (CFBC + long-duration storage) offer faster stabilisation of supply while lowering emissions.</li> </ul> <p><b>7. Eskom Financial Stabilisation</b></p> <ul style="list-style-type: none"> <li>Transition financing will rely on <b>highly concessional facilities</b>, avoiding further escalation of Eskom debt.</li> <li>Distribution reforms and improved revenue management strengthen Eskom’s financial sustainability and reduce exposure to municipal non-payment.</li> </ul>

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**Logistics, Ports & Rail Reform**

<p><i>Reform network industries (rail, ports) to improve performance; protect economic infrastructure.</i></p>	<p><i>“Fix transport and logistics as strategic national assets”; invest in corridors and lower economy-wide costs.</i></p>	<p>Transnet Upgrades: Major upgrades underway at Durban (Pier 1 &amp; 2), Ngqura and Richards Bay terminals; LeaseCo, manganese and dry-bulk terminals, Project Ukuvuselela and fuel/LNG infrastructure.</p> <p><b>Key Investments:</b></p> <ul style="list-style-type: none"> <li>▪ Durban Container Terminal: new straddles, RTGs, STS cranes, hauliers &amp; trailers.</li> <li>▪ PE &amp; Cape Town terminals upgraded in FY2026.</li> <li>▪ R3.4bn (2025) allocated for TPT equipment renewal.</li> </ul> <p><b>Freight Performance:</b></p> <ul style="list-style-type: none"> <li>▪ 94.77mt moved by Oct (92% of budget).</li> <li>▪ Rolling tempo improving (3.38mt → 3.53mt).</li> <li>▪ Gains driven by corridor improvements, higher loco/wagon availability, TPT productivity, and strengthened security.</li> <li>▪ Container volumes 1% above YTD target, 7.2% up YoY.</li> </ul> <p>Private Sector Participation (RFI)</p> <p>:Strong local &amp; international interest; now progressing to Business Plans and RFPs for ore, manganese, coal, chrome and container corridors.</p> <p><b>PRASA Recovery</b></p> <ul style="list-style-type: none"> <li>▪ 35/40 corridors restored; 76.7m trips in last FY; target 600m by 2030.</li> <li>▪ Key corridors recovered: Randfontein, Crossmoor, Katlehong, Central Line.</li> </ul>
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**Industrial Policy – Steel, Ferrochrome & Metals**

<p><i>Prioritise industrialisation and domestic productive capacity; deploy trade remedies; support beneficiation and strategic sectors like steel.</i></p>	<p><i>“Protect strategic existing industries like steel, and advance industries of the future.”</i></p>	<p><b>Re-Industrialization</b></p> <ul style="list-style-type: none"> <li>▪ South Africa’s re-industrialisation agenda, guided by the National Industrial Policy, centres on localisation, beneficiation, and value-addition to rebuild domestic productive capacity.</li> <li>▪ Key programmes include sector masterplans, import-substitution measures, and targeted support for firms through the IDC/NEF to expand manufacturing output and secure industrial jobs.</li> </ul> <p><b>IDC &amp; AMSA Transaction:</b></p> <p>The IDC is currently engaged in negotiations with ArcelorMittal South Africa (AMSA) as part of a potential takeover. AMSA is under cautionary, reflecting efforts to assess the viability of an IDC-led intervention to stabilise and reposition the steel industry.</p> <p><b>Steel Roadmap Priorities:</b></p> <ul style="list-style-type: none"> <li>▪ Accelerate steel-based infrastructure investment across the economy.</li> <li>▪ Enforce local content requirements through ITAC and public procurement instruments.</li> <li>▪ Support new investments in downstream steel fabrication and manufacturing to deepen industrial linkages.</li> </ul> <p><b>Transport Sector Localisation (PRASA – Gibela)</b></p> <ul style="list-style-type: none"> <li>▪ Localization is a core pillar of PRASA’s rolling-stock programme with Gibela, supported by a fully local manufacturing plant.</li> <li>▪ Gibela has achieved 76% local content in its manufacturing contract (capex, sourcing, tax and operational spend).</li> <li>▪ In October 2025, Gibela delivered its 300th Isitimela Sabantu EMU, demonstrating strong domestic engineering capability.</li> </ul>
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**Automotive (ICE → NEV) & Components Manufacturing**

<p><i>Prepare for EV transition with domestic production and jobs; expand incentives; secure value chains.</i></p>	<p><i>Build industries of the future (NEVs); deepen exports via AfCFTA/BRICS+; supplier upgrading and skills.</i></p>	<ul style="list-style-type: none"> <li>▪ <b>Automotive Production and Development Programme (APDP):</b> Regulations updated to include battery electric vehicles (BEVs) and fuel-cell electric vehicles (FCEVs). Work is underway to also include plug-in hybrid electric vehicles (PHEVs).</li> <li>▪ <b>Automotive Investment Scheme (AIS):</b> Guidelines amended so that incentives now cover investments in electric-vehicle manufacturing.</li> <li>▪ <b>Electric &amp; Hydrogen Vehicle Incentive:</b> A 150% tax deduction will be available from March 2026 for manufacturers investing in new electric or hydrogen-powered vehicle production in South Africa.</li> <li>▪ <b>Critical Minerals Strategy:</b> Approved by Cabinet to strengthen South Africa's position in supplying essential minerals for EVs, batteries and green-energy technologies.</li> <li>▪ <b>Battery Value Chain Development:</b> The dtic and IDC are designing a framework to support local beneficiation, battery mineral processing, component manufacturing and battery assembly.</li> <li>▪ <b>National Charging Network:</b> SANRAL is updating its Rest and Service Facilities Policy to allow the installation of EV and alternative-energy charging stations along major routes.</li> <li>▪ <b>Transport Just Transition Plan:</b> Will include a national EV roll-out plan and a socio-economic impact assessment to protect vulnerable workers and communities affected by the transition.</li> <li>▪ <b>Baseline Study on Charging Infrastructure:</b> Mapping the current state of EV charging in South Africa to guide future investment and deployment.</li> <li>▪ <b>Green Transport Strategy:</b> Ongoing research into the feasibility of electric and green-hydrogen powered minibus taxis.</li> </ul>
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**Spatial Reindustrialization (SEZs, Industrial Parks, Township/Rural Zones)**

<p><i>Address uneven development; rebuild industrial parks; integrate township/rural economies into value chains.</i></p>	<p><i>Invest in infrastructure; one-stop investor services; set-asides for SMEs/women/youth.</i></p>	<p><b>SEZ Infrastructure Investment</b></p> <ul style="list-style-type: none"> <li>▪ <b>R12.1 billion</b> disbursed to SEZs for <b>bulk and top-structure infrastructure</b> as of Q3 2025/26.</li> <li>▪ Investments support industrial readiness, investor attraction and job-creating manufacturing capacity across the SEZ network.</li> </ul> <p><b>2. Expansion of One-Stop Shops (OSS)</b></p> <ul style="list-style-type: none"> <li>▪ <b>3 Provincial OSS:</b> Gauteng, Western Cape, KwaZulu-Natal.</li> <li>▪ <b>4 SEZ-based OSS:</b> Dube TradePort, Coega, Richards Bay, East London.</li> <li>▪ <b>District OSS:</b> 1 in Gauteng, 4 in KZN.</li> </ul> <p>These platforms streamline regulatory approvals and investor facilitation to reduce turnaround times for business setup.</p> <p><b>3. SME Development Across SEZs</b></p> <p><b>Coega SEZ:</b></p> <ul style="list-style-type: none"> <li>▪ <b>331 small enterprises</b> supported through training and development programmes.</li> <li>▪ <b>167 participants were women;</b> the remainder included youth, persons with disabilities and military veterans.</li> <li>▪ <b>R1 billion procurement to SMMEs,</b> representing <b>69.42%</b> of total procurement spend in the past financial year.</li> </ul> <p><b>Dube TradePort SEZ:</b></p> <ul style="list-style-type: none"> <li>▪ <b>R90 million</b> invested in a <b>mini-factory complex</b> to incubate SMEs.</li> <li>▪ Offers <b>rental support</b> with subsidies of up to <b>15%</b> for black-owned SMMEs.</li> <li>▪ Piloting <b>revenue-based rental models</b> to ease early-stage cash-flow constraints.</li> </ul> <p><b>East London IDZ:</b></p> <ul style="list-style-type: none"> <li>▪ <b>3 enterprise incubators operational.</b></li> <li>▪ <b>62 enterprises</b> supported as of Q2 2025/26.</li> <li>▪ SEZ committed to <b>30% procurement spend</b> on SMEs.</li> </ul> <p><b>4. New Spatial Industrial Development Strategy</b></p> <ul style="list-style-type: none"> <li>▪ dtic has drafted a <b>new Spatial Industrial Development Strategy,</b> introducing a refreshed model for <b>Special Economic Zone development</b> and <b>Industrial Parks revitalisation.</b></li> <li>▪ The strategy focuses on integrated spatial industrialisation, improved governance models and stronger links between SEZs, industrial parks and regional value chains.</li> </ul>
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**Pharmaceuticals & Health Manufacturing**

*Develop local manufacturing capacity in health and pharmaceuticals as part of industrial diversification.*

*Strengthen health sovereignty; support local production of APIs, vaccines and devices.*

**Strengthening Domestic Demand for Local Medicines**

- Demand-side reforms are being advanced to **increase procurement of locally produced medicines**, particularly in high-volume therapeutic areas such as **HIV, diabetes and cardiovascular diseases**.
- Finalisation of the **Preferential Procurement Regulations** under the *Public Procurement Act (Act 28 of 2024)* will reinforce localisation, scale, and long-term purchasing commitments.

**2. Expanding Export Markets Through Continental Integration**

- South Africa is leveraging **AfCFTA-aligned pooled procurement mechanisms** to expand pharmaceutical exports across Africa.
- Local manufacturers. **Aspen, Afrigen, Biovac**, are playing a growing role in producing vaccines and essential medicines for the continent.

**3. Targeted Industrial Incentives for Pharma Manufacturing**

Development of **time-bound catalytic incentives** to support domestic production, including:

- Infrastructure grants to lower setup costs;
- Export-linked incentives;
- **Risk-sharing R&D financing** to accelerate innovation.

- The **IDC** is expanding its role in funding pharma manufacturing and enabling scale-up.

**4. Health Sector–Focused SEZs**

Work is underway to establish **Special Economic Zones dedicated to health and pharmaceuticals**, offering:

- Shared **cold-chain facilities**;
- Effluent treatment systems**;
- Validation and quality-control laboratories**;
- Platform infrastructure tailored to regulatory and GMP (Good Manufacturing Practice) requirements.

**5. Active Pharmaceutical Ingredient (API) & Biologics Development**

Feasibility studies are in progress to build a **domestic API and biologics value chain**, aimed at reducing foreign exchange exposure, mitigating supply risk, and strengthening South Africa’s resilience in essential medicines.

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<p><i>Implement the National Infrastructure Plan 2050; modernise SOEs (Eskom, Transnet, PRASA, SANRAL).</i></p>	<p><i>Use infrastructure (energy, transport, water) as strategic enablers; shovel-ready project delivery.</i></p>	<p><b>Transnet</b></p> <p><b>Port Modernisation &amp; Fleet Renewal</b></p> <ul style="list-style-type: none"> <li>▪ Transnet is modernising key container terminals, improving efficiency and capacity.</li> <li>▪ <b>5 new ship-to-shore cranes delivered in 2025</b> under the <b>R3 billion acquisition programme</b>—built to improve ship turnaround, operate in stronger winds, and increase cargo-handling performance.</li> <li>▪ <b>20 new straddle carriers</b> and <b>9 rubber-tyred gantry cranes (RTGs)</b> acquired to boost terminal productivity.</li> </ul> <p>▪ <b>SANRAL</b></p> <p><b>Flagship national road upgrades</b> continue to reshape apartheid-era spatial layouts, improve mobility, and expand economic access while supporting SMMEs and job creation. Key projects include:</p> <ul style="list-style-type: none"> <li>▪ <b>N2 and N3 expansion (KwaZulu-Natal)</b></li> <li>▪ <b>Moloto Road (R573) upgrade</b> across Gauteng, Mpumalanga &amp; Limpopo</li> <li>▪ <b>N2 Wild Coast Road (Eastern Cape)</b></li> <li>▪ <b>N2 Richards Bay–Ermelo (KZN/Mpumalanga)</b></li> <li>▪ <b>N1 Bela-Bela–Beitbridge (Limpopo)</b></li> <li>▪ <b>Huguenot Tunnel upgrade (Western Cape)</b></li> </ul> <p><b>Airports Company South Africa (ACSA)</b></p> <ul style="list-style-type: none"> <li>▪ <b>Terminal expansion and upgrades</b> underway at <b>three airports</b> in 2024/25, including Cape Town International.</li> <li>▪ Construction of a <b>R5.7 billion midfield cargo terminal</b> at OR Tambo International begins in <b>2026/27</b>, unlocking major SMME and employment opportunities.</li> </ul>

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**Public Infrastructure & NIP 2050 / Catalytic Projects (continued)**

<p><i>Implement the National Infrastructure Plan 2050; modernise SOEs (Eskom, Transnet, PRASA, SANRAL).</i></p>	<p><i>Use infrastructure (energy, transport, water) as strategic enablers; shovel-ready project delivery.</i></p>	<p><b>Strategic Integrated Projects (SIPs)</b></p> <ul style="list-style-type: none"> <li>▪ <b>National SIP portfolio value: R3.7 trillion (2020–2025)</b>, covering all nine provinces and sectors including energy, water, transport, digital, settlements, science and agriculture.</li> </ul> <p><b>Completed SIPs (31 projects, R44.99 billion)</b></p> <ul style="list-style-type: none"> <li>▪ Water &amp; sanitation upgrades</li> <li>▪ <b>Hazelmere Dam</b></li> <li>▪ <b>Vaal Gamagara Phase 1</b></li> <li>▪ Renewable builds: <b>Redstone CSP, Kenhardt solar</b></li> <li>▪ Road upgrades across <b>N1, N2, N3</b></li> <li>▪ <b>Student accommodation</b> delivering <b>6,000+ beds</b></li> </ul> <p><b>SIPs Under Construction (78 projects, R463.53 billion)</b></p> <ul style="list-style-type: none"> <li>▪ <b>Lesotho Highlands Water Project Phase 2</b> (R53 billion)</li> <li>▪ <b>Clanwilliam Dam raising</b> (R7 billion)</li> <li>▪ Major logistics corridors</li> <li>▪ <b>SKA/MeerKAT science facility upgrades</b></li> </ul> <p><b>SIPs in Procurement</b></p> <p><b>46 projects</b>, valued at <b>R184.42 billion</b>, majority in the <b>energy sector</b>.</p> <ul style="list-style-type: none"> <li>▪ <b>Regulatory Unblocking (Infrastructure SA)</b></li> <li>▪ <b>693 requests received</b></li> <li>▪ <b>532 cleared (77%)</b></li> <li>▪ <b>Average turnaround: 148 days</b></li> <li>▪ Most requests (659) linked to <b>large-scale renewable energy projects</b>.</li> </ul>
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**Science, Technology & Innovation; Skills for Industry**

*Raise R&D (GERD); mission-oriented programmes (hydrogen, PGMs, advanced manufacturing, AI); align skills to industrial strategy.*

**Drive digital skills development and capacity building**

*Use science & innovation for development; youth opportunities; digital economy expansion.*

**“Develop skills for the digital economy and 4IR.”**

- **Labour Activation Programme (LAP):** Implementation underway, supporting pathways into employment through reskilling, workplace exposure and activation partnerships.
  - **Innovation Fund Pilots:** Rolled out to test new employment-creation models, enterprise development approaches, and digital/blended learning interventions.
  - **Education for Employability (E4E):** South Africa participating in the **EU-funded programme**, strengthening technical and vocational training to improve employability for youth and jobseekers.
- Youth Digital Skills Expansion (NEMISA)**
- **1,542 learners** trained in creative media short courses (2022–2024).
  - **254 learners** completed creative media learnerships.
  - **152,155 individuals** trained in **basic digital literacy**, expanding foundational digital inclusion nationwide.
  - **16,613 people** trained in **digital entrepreneurship**, supporting township, rural and MSME digital business development.
- Civil Aviation (SACAA)**  
**360 youth** supported through structured aviation training in 2024/25:
- 204 internships
  - 109 bursaries (pilots, maintenance technicians, aeronautical engineering, etc.)
  - 31 traineeships
  - 16 learnerships
- 208 of the beneficiaries were women**, signalling meaningful transformation and gender inclusion in high-skill aviation careers.
- Airports Company South Africa (ACSA)**
- **R13.5 million** invested in youth and women’s education and skills programmes.
  - **R2.4 million** allocated to bursaries for employees and their dependants.
  - **524 young people** recruited (2014–2019) into learnerships, internships, apprenticeships and trainee engineer programmes.
- Air Traffic & Navigation Services (ATNS)**
- To address scarce skills in air navigation, **120 bursaries** funded in 2024/25 for Air Traffic Services training—building a sustainable pipeline of critical, high-demand technical skills.

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**Trade Policy & Market Diversification (AGOA, AfCFTA, BRICS+)**

<p><i>Use trade policy to serve domestic production; expand Africa trade; deploy defensive remedies; defend sovereignty.</i></p>	<p><i>Increase value-added exports using AfCFTA/BRICS+; support emerging exporters; standards diplomacy.</i></p>	<p>South Africa is recalibrating its trade strategy in response to global tariffs and protectionism by expanding beyond traditional partners and deepening African integration through the <b>African Continental Free Trade Area (AfCFTA)</b>.</p> <ol style="list-style-type: none"> <li><b>AfCFTA – Africa as the Anchor Market</b> <ul style="list-style-type: none"> <li>Work underway to remove tariffs and non-tariff barriers, harmonise customs rules, and build regional value chains in autos, steel, agro-processing and minerals.</li> <li>Forms the most stable platform for derisking against global tariff shocks.</li> </ul> </li> <li><b>European Union</b> <ul style="list-style-type: none"> <li>Signed the <b>Clean Trade and Investment Partnership</b>, unlocking <b>€12 billion</b> for green hydrogen and clean-industry projects in the Northern Cape, Eastern Cape and Western Cape.</li> <li>Engagement on enabling exports of <b>Sustainable Aviation Fuel</b>, positioning Secunda as a low-carbon industrial hub.</li> </ul> </li> <li><b>United States</b> <ul style="list-style-type: none"> <li>South Africa is negotiating an <b>Agreement on Reciprocal Tariffs</b> to stabilise trade following new US tariff measures.</li> <li>Focus is on protecting autos, steel, agriculture and components.</li> </ul> </li> <li><b>China</b> <ul style="list-style-type: none"> <li>China has offered <b>100% duty-free access</b> to African exports.</li> <li>South Africa advancing the <b>China–Africa Economic Partnership Agreement</b> to shift exports away from raw commodities toward value-added goods.</li> </ul> </li> <li><b>MERCOSUR (South America)</b> <ul style="list-style-type: none"> <li>The Preferential Trade Agreement is open for expansion to include South African export-interest products.</li> </ul> </li> <li><b>Gulf Cooperation Council (GCC)</b> <ul style="list-style-type: none"> <li>New investments being advanced in agriculture, mining, capital equipment and chemicals.</li> </ul> </li> </ol> <p><b>Enablers of Diversification</b></p> <ul style="list-style-type: none"> <li><b>Development Finance Institutions</b> (IDC, NEF, ECIC) are being repositioned from lenders to proactive equity partners supporting export-oriented industries.</li> <li><b>Investment Promotion Programme:</b> Target to mobilise <b>R3 trillion (2023–2028)</b>, fast-tracking approvals for high-growth sectors and green industrialisation.</li> </ul>
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**Financial Sector Transformation & State/Cooperative Bank; DFI Alignment**

<p><i>Reaffirm establishment of a State Bank; address unjust lack of access to capital for SMMEs, women, youth; activist role for institutional investors (e.g., PIC).</i></p>	<p><i>Establish state and cooperative development banks; transform DFIs; mobilise institutional savings for productive sectors.</i></p>	<p><b>1. Strengthening Financial Inclusion (Core Mandate of State Bank)</b></p> <ul style="list-style-type: none"> <li>▪ <b>23.5% of adults remain unbanked</b>, and bank fees remain a major barrier (67% say fees are too high) .</li> <li>▪ <b>62% of SMMEs still cannot access credit</b> and rely on personal savings or informal finance, underscoring the need for a public financial institution that fills market gaps left by commercial banks .</li> <li>▪ Postbank already provides <b>low-cost, deduction-free accounts</b> to ~5 million customers and <b>over 3 million SASSA beneficiaries</b>, ensuring protection from exploitative charges and illegal deductions (e.g., first 3 cash withdrawals free; no monthly fees).</li> </ul> <p><b>2. Postbank’s Trajectory Toward Becoming a Fully-Fledged State Bank</b></p> <ul style="list-style-type: none"> <li>▪ Postbank has <b>retained its payment-system licence</b>, continues to take deposits legally, and is <b>90% complete with its Financial Services Provider licence</b> application .</li> <li>▪ It holds a <b>Section 13 banking licence</b> and is preparing to meet conditions for a <b>Section 16 full commercial banking licence</b>, which would allow banking of government departments, municipalities and SOEs as required under the PFMA.</li> <li>▪ The bank has implemented a structured <b>three-phase roadmap</b> (Stabilise → Grow → Differentiate) to transform into a development-oriented State Bank within 24 months.</li> </ul> <p><b>3. Operational Strengthening &amp; Governance Improvements</b></p> <ul style="list-style-type: none"> <li>▪ Postbank now has <b>over 5 million customers</b>, manages <b>R9 billion in deposits</b>, and disburses <b>~R60 billion in government funds annually</b> (including SASSA, SRD, and EPWP).</li> <li>▪ It moved from three years of audit disclaimers to an <b>unqualified audit opinion in 2024/25</b>, demonstrating significant governance recovery and internal control improvements.</li> </ul> <p>Liquidity and stability ratios are strong:</p> <ul style="list-style-type: none"> <li>▪ <b>Liquidity Coverage Ratio: 160%</b>,</li> <li>▪ <b>Net Stable Funding Ratio: 148%</b>,</li> <li>▪ <b>Cost-to-income ratio: 69%</b>—all within or above regulatory benchmarks.</li> </ul>
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Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
<b>Financial Sector Transformation &amp; State/Cooperative Bank; DFI Alignment</b>		
<p><i>Reaffirm establishment of a State Bank; address unjust lack of access to capital for SMMEs, women, youth; activist role for institutional investors (e.g., PIC).</i></p>	<p><i>Establish state and cooperative development banks; transform DFIs; mobilise institutional savings for productive sectors.</i></p>	<p><b>4. Digital &amp; Infrastructure Investments Enabling State Bank Readiness</b></p> <ul style="list-style-type: none"> <li>▪ Over <b>R500 million invested</b> in core systems over two years, including:</li> <li>▪ A new <b>core banking platform</b>, EMV-compliant switching, and disaster-recovery systems.</li> <li>▪ Upgraded <b>fraud-prevention systems</b> (PCI-DSS compliant), reducing fraud by <b>over 80% year-on-year</b>.</li> <li>▪ A new customer contact centre and <b>300+ retail “bank kiosks”</b> for township and rural access.</li> <li>▪ These investments ensure Postbank has <b>not missed a single grant payment run in two years</b> and has not been penalised by SASSA since 2023/24.</li> </ul> <p><b>5. Role in Social Protection &amp; Development Finance</b></p> <ul style="list-style-type: none"> <li>▪ Postbank services ~2 million SASSA beneficiaries directly, providing <b>full grant access with zero deductions</b>, protecting the poorest households from predatory financial practices .</li> <li>▪ It supports <b>group savings (stokvels)</b>, 135,000 group accounts, strengthening informal and community-based financial ecosystems .</li> <li>▪ It is positioned to become the <b>“strategic financial services and administration partner”</b> for social protection, poverty reduction, and public-sector financial efficiency, with the ability to ring-fence spending (e.g., NSFAS accommodation) and reduce leakages in government payments.</li> </ul> <p><b>6. Capitalisation Requirements for Full State Bank Status</b></p> <ul style="list-style-type: none"> <li>▪ To complete its transformation, Postbank requires a <b>R2.3 billion equity injection</b>, not a bailout:</li> <li>▪ <b>R1.7 billion</b> for regulatory capital adequacy (to qualify for a full commercial licence).</li> <li>▪ <b>R0.6 billion</b> to complete the bank-building programme (infrastructure, systems, compliance capacity). This would enable Postbank to service municipalities, SOEs, and government departments legally and sustainably, meeting PFMA and Banks Act requirements.</li> </ul>

Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
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**Competition Policy & De-concentration of Markets**

<p><i>Challenge highly concentrated ownership; use procurement and competition remedies to open markets; advance worker/co-op ownership.</i></p>	<p><i>Promote inclusive economy; enforce employment equity; open value chains to SMMEs and new entrants.</i></p>	<ul style="list-style-type: none"> <li>▪ <b>Market Concentration Reporting:</b> The Competition Commission will release its latest <b>Concentration Report</b> in the final quarter of this financial year. The report will provide an updated snapshot of concentration levels across key sectors of the economy and outline emerging trends affecting competitiveness and inclusion.</li> <li>▪ <b>Transformation Through Merger Regulation:</b> Since 2019, the Commission’s merger conditions have delivered substantial equity and participation gains: <ul style="list-style-type: none"> <li>➢ <b>R60 billion</b> in value transferred to workers through Employee Share Ownership Plans (ESOPs).</li> <li>➢ <b>R16.5 billion</b> in transactions involving firms owned by Historically Disadvantaged Persons (HDPs).</li> <li>➢ <b>R130 billion</b> in support to HDP and SMME firms, including <b>R65 billion in capital expenditure</b> and <b>R19 billion in procurement</b> commitments.</li> </ul> </li> <li>▪ <b>Removing Barriers to Entry (Post-2019 Amendments):</b> The strengthened Competition Act has enabled the Commission to impose <b>pro-competitive remedies</b> that open markets for SMEs and HDP-owned firms. Key interventions include: <ul style="list-style-type: none"> <li>➢ <b>Online Intermediation Platforms Market Inquiry (OIPMI)</b></li> <li>➢ <b>Fresh Produce Market Inquiry (FPMI)</b></li> <li>➢ <b>Media and Digital Platforms Market Inquiry</b></li> </ul> <p>These have addressed exclusionary practices, platform dominance, and unfair trading conditions.</p> </li> <li>▪ <b>Cartels &amp; Market Conduct Enforcement:</b> Ongoing enforcement actions have targeted collusion, abuse of dominance, and exclusionary conduct—removing barriers to market entry and improving participation opportunities for SMEs and HDP-owned companies.</li> <li>▪ <b>Advocacy &amp; Awareness:</b> The Commission continues to strengthen understanding of the Competition Act across the economy, using advocacy to encourage compliance, reduce barriers to entry, and support inclusive participation in key value chains.</li> </ul>
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Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
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**Informal Economy & Cooperatives**

<p><i>Expand co-ops and township enterprise support; procurement access; finance and infrastructure.</i></p>	<p><i>Support the informal economy; provide market access and infrastructure (trading spaces, storage, logistics).</i></p>	<ul style="list-style-type: none"> <li>▪ A total of 835 Co-ops were supported for the period under review (2022/23 to 2024/25).</li> <li>▪ Furthermore, 66 694 rural and township enterprises benefited financially and non-financially. Craft sector development beneficiaries amounted to 2210 while Start-up</li> <li>▪ Youth owned businesses total 70 922 during the same period.</li> <li>▪ Total MSMEs and Co-ops supported for market access amounts to 629 while 868 products were linked to local market. A total of 5493 beneficiaries were supported through IMED from 2023/24 financial year.</li> <li>▪ The Spaza Shop Fund (R500 million, launched April 2025) offers stock purchases, infrastructure upgrades, and training for township retailers.</li> <li>▪ The Energy Bounce Back Loan Guarantee Scheme aids solar investments</li> <li>▪ Blended Finance via SEFA. It provides up to R2.5 million grant portion.</li> <li>▪ The Business Licensing Bill, 2025 aims to modernise and streamline business licensing processes, reduce regulatory burdens (red tape), and promote inclusive economic growth, particularly for MSMEs, co-operatives, and township enterprises.</li> </ul>
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Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
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**Cost of Living & Social Wage (NHI, SRD/BIS, Transport, Energy)**

<p><i>Expand social protection; protect poor in JET; maintain subsidised basic services; tackle cartels and price abuses.</i></p>	<p><i>Reduce cost of living; implement NHI; cheaper solar and commuter transport; VAT relief on key foods; ensure National Minimum Wage compliance.</i></p>	<p><b>Strengthening Worker Protection Systems</b></p> <ul style="list-style-type: none"> <li>Ongoing oversight of the <b>Unemployment Insurance Fund (UIF)</b> and <b>Compensation Fund (CF)</b> to safeguard workers against <b>income loss, injury or death</b>, and to improve claims processing and accountability.</li> </ul> <p><b>Expanded Social Support Through Joint Funding</b></p> <ul style="list-style-type: none"> <li>UIF and CF jointly fund access to <b>higher education</b> for dependants of injured or deceased workers, persons with disabilities, and the <b>“missing middle”</b>, widening access to post-school training.</li> </ul> <p><b>Employment Equity Act Implementation (Effective 1 Jan 2025)</b></p> <ul style="list-style-type: none"> <li>Enforcement of revised <b>sectoral targets</b> and a new <b>compliance certification</b> regime to accelerate workplace transformation.</li> </ul> <p><b>Regulation of Foreign Labour</b></p> <ul style="list-style-type: none"> <li>Introduction of <b>sectoral quotas</b> and strengthened compliance mechanisms to ensure lawful participation of foreign workers while protecting local employment opportunities.</li> </ul> <p><b>Rail Corridor Recovery for Working-Class Mobility (PRASA)</b></p> <ul style="list-style-type: none"> <li><b>35 of 40 priority corridors</b> have been restored, enabling the reintroduction of affordable rail services in working-class communities.</li> </ul> <p><b>Increasing Passenger Rail Volumes</b></p> <ul style="list-style-type: none"> <li><b>77 million trips</b> recorded in 2024/25 following corridor recovery and re-signalling efforts.</li> <li>Target: <b>116 million trips</b> by end of 2025/26 and <b>600 million annually by 2030</b>, returning to pre-pandemic levels.</li> </ul> <p><b>Affordable Public Transport</b></p> <ul style="list-style-type: none"> <li>PRASA continues to offer the <b>cheapest urban public transport</b>, with a <b>R10 one-way fare</b> for distances between 1–15 km, supporting household affordability and access to economic opportunities.</li> </ul>
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Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
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**Land Reform, Agriculture & Food Security**

<p><i>Implement Expropriation Act; accelerate redistribution with productive utilisation; strengthen Land Bank; agro-parks; water access.</i></p>	<p><i>Increase food security; unlock agro-processing and exports; support black farmers; reduce cost of living.</i></p>	<p><b>Modernised Agricultural Legislation</b></p> <ul style="list-style-type: none"> <li>▪ <i>Plant Health Act, 2025</i> (replacing 1983 Act) simplifies export processes and enables farmers to <b>import and re-export</b>, improving competitiveness.</li> <li>▪ <i>Preservation and Development of Agricultural Land Act, 2025</i> protects <b>high-value agricultural land</b> from competing land uses (mining, energy, housing) to safeguard long-term <b>food security</b>.</li> </ul> <p><b>Food Security &amp; Nutrition</b></p> <ul style="list-style-type: none"> <li>▪ The <b>National Food and Nutrition Security Plan (NFNSP)</b> launched to build <b>inclusive local food value chains</b> and improve nutritional outcomes.</li> </ul> <p><b>Animal Health Interventions</b></p> <ul style="list-style-type: none"> <li>▪ <b>FMD Indaba</b> convened all farmer categories; agreed that <b>commercial farmers will self-fund vaccines</b>, allowing the state to prioritise communal and small-scale farmers.</li> </ul> <p><b>Transformation Instruments</b></p> <ul style="list-style-type: none"> <li>▪ The <b>Norms and Standards for Designated Groups (NSDG)</b> implemented, setting measurable targets: <b>50% women, 40% youth, 10% persons with disabilities</b> across support programmes.</li> <li>▪ The <b>National Policy on Comprehensive Producer Development Support (NPCPDS)</b> strengthens empowerment of designated groups and expands the pipeline of <b>young producers and agrifood entrepreneurs</b>.</li> </ul> <p><b>Youth in Food Systems</b></p> <ul style="list-style-type: none"> <li>▪ Launched the <b>World Food Forum – South African Youth Chapter</b>, a youth-led platform advancing inclusive, sustainable food-system transformation.</li> </ul>
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Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
<b>Land Reform, Agriculture &amp; Food Security (Continued)</b>		
<p><i>Implement Expropriation Act; accelerate redistribution with productive utilisation; strengthen Land Bank; agro-parks; water access.</i></p>	<p><i>Increase food security; unlock agro-processing and exports; support black farmers; reduce cost of living.</i></p>	<p><b>Accelerating Land Reform</b></p> <ul style="list-style-type: none"> <li>An <b>Inter-Ministerial Committee on Land Reform</b> is coordinating redistribution, tenure reform and post-settlement support, integrating the 2019 Presidential Advisory Panel recommendations.</li> </ul> <p><b>Strengthening Tenure Security</b></p> <ul style="list-style-type: none"> <li>Amendments to the <b>Communal Property Associations Act, Upgrading of Land Tenure Rights Act, and Extension of Security of Tenure Act</b> now improve governance, enable conversion of tenure rights to ownership, and enhance legal protection for occupiers and labour tenants.</li> </ul> <p><b>Key Bills in Finalisation</b></p> <ul style="list-style-type: none"> <li><b>Equitable Access to Land Bill:</b> addresses highly skewed land ownership patterns and expands access.</li> <li><b>Communal Tenure &amp; Administration Bill:</b> secures tenure and transfers trust land to communities.</li> </ul> <p><b>Redistribution Outputs</b></p> <ul style="list-style-type: none"> <li>Since 1994: <b>5.9 million hectares</b> acquired for redistribution.</li> <li>Since 2019: <b>362,000 hectares</b> allocated to women, youth and persons with disabilities.</li> <li><b>49 state-leased land projects</b> transferred to beneficiaries.</li> <li><b>257 farms</b> supported with infrastructure, machinery and operational support through post-settlement programmes.</li> </ul> <p><b>Tenure Reform Delivery</b></p> <ul style="list-style-type: none"> <li>Progress on labour tenant claims, ESTA transfers and TCRA community processes, with increased capacity following recent legislative amendments.</li> </ul>

Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
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**Land Reform, Agriculture & Food Security (Continued)**

<p><i>Implement Expropriation Act; accelerate redistribution with productive utilisation; strengthen Land Bank; agro-parks; water access.</i></p>	<p><i>Increase food security; unlock agro-processing and exports; support black farmers; reduce cost of living.</i></p>	<p><b>Land Release for Agriculture, Human Settlements &amp; Restitution</b></p> <ul style="list-style-type: none"> <li>▪ <b>120+ parcels (25,000 ha)</b> released for redistribution (smallholder farming, emerging commercial farmers, township economic revitalisation, community development).</li> <li>▪ <b>204 parcels (28,000 ha)</b> made available for <b>land restitution</b>, enabling claimants to return or receive suitable alternative land.</li> <li>▪ <b>44 parcels (2,557 ha)</b> released for <b>mixed-income housing</b>, social housing and township regeneration.</li> </ul> <p><b>Energy Security &amp; Infrastructure Expansion</b></p> <ul style="list-style-type: none"> <li>▪ DPWI has provided <b>24 strategic land parcels</b> for Eskom servitudes and national energy projects, enabling grid expansion and contributing to energy-security programmes.</li> </ul> <p><b>Expropriation Act, 2025 – Implementation Underway</b></p> <ul style="list-style-type: none"> <li>▪ New Act provides a <b>uniform, transparent and constitutional framework</b> for expropriation across the state.</li> <li>▪ Clear guidance on when <b>nil compensation</b> may apply, with courts safeguarding just and equitable outcomes.</li> <li>▪ Full implementation plan in development: regulations, training of expropriating authorities, capacity-building and monitoring framework.</li> </ul>
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Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
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**SOE Reform & State Capability (Professionalization and Coordination)**

<p><i>Build a capable, ethical state; coordinate SOEs nationally; protect infrastructure; enforce consequence management.</i></p>	<p><i>Developmental state; improve service delivery and project execution; DDM alignment.</i></p>	<ul style="list-style-type: none"> <li>▪ SOE review underway; partial integration achieved in shared infrastructure projects.</li> <li>▪ As per Presidential Proclamation No. 176 of 2024, the administration of Transnet and South African Airways were transferred to the Department of Transport on 23 August 2024</li> <li>▪ In order to rationalize and better manage the entity’s operations, and in alignment with the National Rail Policy, Transnet Rail has been unbundled into two distinct divisions, Transnet Rail Infrastructure Manager and Transnet Freight Rail.</li> </ul>
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Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
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**Youth Employment & Public Employment (EPWP re-conceptualized)**

*Improve working conditions in EPWP; reconceptualise and extend EPWP to offer training; fill state vacancies to absorb unemployed graduates; limit executive pay gap.*

*Expand public employment; scale skills pathways; ensure NMW compliance and learnerships.*

**Youth Employment & Pathways**

- 20,000 youth interns placed across the Department of Employment and Labour, UIF, and Compensation Fund, with recruitment re-advertised via the **DPSA–Harambee SA Youth Platform**.

**Labour Market Compliance & Worker Protection**

- Ongoing enforcement of the **National Minimum Wage Act** and intensified labour-inspection campaigns.
- Implementation of the **Draft Code of Good Practice: Dismissal**, introducing **simplified and fair procedures** for SMMEs while safeguarding worker rights.

**Wage Subsidies for Youth**

- UIF-funded **wage-subsidy placements** continue to support youth employment in basic-education roles as **educator assistants and general school assistants**, bridging work readiness and schooling-system capacity.

**SANRAL – Job Creation, Skills & Enterprise Support**

- 2023/24:** 12,652 full-time equivalent (FTE) jobs created (target: 12,000).
- 2024/25:**
  - 35,594 annual jobs created
  - 15,050 FTE jobs
  - 2012 SMMEs supported
  - 150 external bursaries and 250 scholarships awarded

**Projected Job Creation from Flagship Road Upgrades**

- N2/N3 Expansion (KZN):** 17,000 FTE jobs
- Moloto Road (R573):** 6,250 jobs
- N2 Wild Coast:** 8,000 FTE jobs
- N2 Richards Bay–Ermelo:** 19,500 FTE jobs
- N1 Bela-Bela–Beitbridge:** 6,000 FTE jobs
- NDP Alignment:** SANRAL aims to deliver **75,000 job opportunities** and support **10,000 SMMEs** over five years.

Conference Resolution & Clause (55th)	Manifesto Commitment (2024)	Progress to Date (as at NGC midterm)
<b>Youth Employment &amp; Public Employment (EPWP re-conceptualized) continued</b>		
<p><i>Improve working conditions in EPWP; reconceptualise and extend EPWP to offer training; fill state vacancies to absorb unemployed graduates; limit executive pay gap.</i></p>	<p><i>Expand public employment; scale skills pathways; ensure NMW compliance and learnerships.</i></p>	<p><b>Airports Company South Africa (ACSA)</b></p> <ul style="list-style-type: none"> <li>62% of R551 million infrastructure spend directed to <b>black-owned suppliers</b>; 39% to companies with ≥30% black female ownership.</li> <li>Airport network <b>employs 23,959 people</b> and contributes <b>R11.2 billion to GDP</b>.</li> </ul> <p><b>Passenger Rail Agency of South Africa (PRASA)</b></p> <ul style="list-style-type: none"> <li><b>R21.1 billion capital spending</b> in 2024/25 generated <b>71,730 induced job opportunities</b>.</li> <li><b>354 trainees, interns, workplace learners and apprentices</b> engaged in 2024/25.</li> <li>Re-signalling programme (R1.89 billion spent) expected to create <b>1.6 jobs per R1 million</b> invested, supporting corridor recovery and system upgrades.</li> </ul> <p><b>EPWP Phase V</b></p> <ul style="list-style-type: none"> <li>EPWP Phase V launched April 2024.</li> <li><b>1,637,319 work opportunities</b> delivered in the first six quarters.</li> <li><b>2024/25</b>: 923,718 opportunities (92% of annual target).</li> <li><b>2025/26 (Q1–Q2)</b>: 713,601 opportunities created.</li> <li>Median duration: <b>76 days (2024/25)</b>; <b>43 days (2025/26 Q2)</b>.</li> </ul> <p><b>Skills Development Impact</b></p> <ul style="list-style-type: none"> <li><b>39,000+ participants</b> completed financial literacy training.</li> <li><b>4,369</b> placed in <b>TVET programmes</b> (hospitality, welding, carpentry, plumbing, electrical).</li> <li>EPWP contributed <b>30% of all artisanal qualifications</b> nationally.</li> <li><b>206 artisans</b> qualified; <b>54</b> gained permanent employment.</li> <li><b>192 MSMEs</b> supported; <b>43 new enterprises</b> established.</li> </ul>

# ANC Economic Action Plan – Full Delivery Performance Report Card (2025–2030)

## ANC Economic Action Plan – Full Delivery Performance Report Card (2025–2030)

### 1. Template Overview

Timeline Category	Time Frame	Purpose
Short-Term	Oct 2025 – Mar 2026	Immediate policy activation, groundwork, and early outputs.
Medium-Term	Apr 2026 – Sep 2027	Structural rollout, consolidation, and institutionalisation.
Long-Term	Oct 2027 – Sep 2030	Systemic transformation, full implementation, and review.

### 2A. Short-Term (Oct 2025 – Mar 2026)

Priority Area	Goal	Lead Agency	Key Outputs / Indicators	Milestones Achieved	Status	Remarks / Risk Notes
Electricity Tariffs & Transmission Reform	Draft preferential tariffs & initiate Fast Lane for TDP	Eskom / DEE / NT / DBSA / dtic	Tariff gazetted; 14,500 km transmission plan initiated	Preferential tariff published	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	

<b>Freight &amp; Logistics Recovery</b>	Publish recovery milestones; open access slots	Transnet / DoT / DBSA / Private Operators	Recovery tracker public; corridor EOIs launched	2 corridor EOIs issued	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Chrome &amp; Manganese Tariffs</b>	Gazette export tariffs & anti-dumping cases	dtic / ITAC / DMRE / IDC	Tariff notices issued; defensive duties implemented	First battery precursor approved	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Project Management Capacity</b>	Certify PM Cadre Programme	DPWI / DBSA / NT / DEE / COGTA/MISA	Cadre charter signed; training initiated	200 PMs trained	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Local Government LED &amp; Infrastructure</b>	Deploy LED technical units to 5 pilots	COGTA / SALGA / dtic / Provincial Govts / DSDB	5 LED teams operational; pilot municipalities supported	LED pilot units launched	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Labour Activation &amp; Public Employment</b>	Open first 50,000 apprenticeships	Presidency / DPWI / SETAs / DHET / DEL / dtic / DSBD	Apprentices enrolled; EPWP aligned to infrastructure	Apprenticeship intake complete	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>SMME &amp; DFI Investment</b>	Launch DFI Catalyst Windows	dtic / NEF / IDC / SEFA / DSBD	Catalyst Windows operational across DFIs	Township enterprise funding begun	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	

<b>Provincial Growth &amp; Industrial Parks</b>	Select 2-3 sectors per province	Provincial Govts / dtic / IDC / DSBD / NEF / SEFDA	Sector compacts signed; feasibility studies done	Provincial targets approved	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>US Tariffs &amp; EU CBAM Response</b>	Publish CBAM support menu	dtic / DIRCO / ITAC / Export Councils	CBAM response strategy published	Support package approved	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Budget Strategy &amp; Macro Coordination</b>	GNU budget strategy memo	NT / Presidency / DBSA / Parliament	Budget memo endorsed; policy alignment begun	NEC approval secured	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	

## 2B. Medium-Term (Apr 2026 – Sep 2027)

Priority Area	Goal	Lead Agency	Key Outputs / Indicators	Milestones Achieved	Status	Remarks / Risk Notes
<b>Electricity Tariffs &amp; Transmission Reform</b>	Commission first transmission packages	Eskom / DEE / DBSA	First 5 grid projects commissioned	≥60% local content achieved	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Freight &amp; Logistics Recovery</b>	Award rail & port concessions	Transnet / DoT / DBSA / Private Operators	Concessions awarded; >85% on-time performance	2 corridor concessions finalised	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	

<b>Chrome &amp; Manganese Tariffs</b>	Launch battery precursor programme	dtic / DMRE / IDC	Battery precursor pilot launched	Programme underway	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Project Management Capacity</b>	Deploy to 20 catalytic projects	DPWI / ISA / DBSA	Gateway review system operational	Deployed PM cadre	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Local Government LED</b>	Integrate LED into DDM nationwide	COGTA / SALGA / dtic	15 municipalities with LED units	DDM integration completed	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Labour Activation</b>	Link EPWP/PES to sector masterplans	Presidency / DPWI / DHET / DoL	70% retention rate achieved	Apprentices linked to industries	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>SMME &amp; DFI Investment</b>	Scale concessional finance & offtake access	dtic / IDC / SEFA / DSBD	Private leverage ratio ≥3:1	Expanded township pipelines	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Provincial Industrial Parks</b>	Revitalise parks with localisation targets	Provincial Govts / dtic / IDC	Parks 70% occupied	10 parks functional	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>US Tariffs &amp; CBAM</b>	Lodge safeguards & expand AfCFTA access	dtic / DIRCO / ITAC	AfCFTA exports up 15%	Trade resilience achieved	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Budget Strategy</b>	Public Investment Compact signed	NT / Presidency / DBSA / Parliament	Compact implemented	DFI funds mobilised	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	

## 2C. Long-Term (Oct 2027 – Sep 2030)

Priority Area	Goal	Lead Agency	Key Outputs / Indicators	Milestones Achieved	Status	Remarks / Risk Notes
<b>Electricity Tariffs &amp; Transmission Reform</b>	Full TDP network & renewable supply chains operational	Eskom / DEE / DBSA	133,000 MVA grid capacity achieved	Industrial supply stable	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Freight &amp; Logistics Recovery</b>	Full corridor modernization & freight growth	Transnet / DoT / DBSA	Vessel wait time <2 days	Freight restored	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Chrome &amp; Manganese Tariffs</b>	Integrated value chains for green metals	dtic / DMRE / IDC	Export diversification improved	Smelter output up 10%	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Project Management Capacity</b>	Institutionalize PM cadre in departments	DPWI / ISA / DBSA	80% projects on-schedule	PM cadre standardized	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Local Government LED</b>	Municipal infrastructure aligned with industrial policy	COGTA / SALGA / dtic	LED projects linked to supplier chains	Municipal resilience improved	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	

<b>Labour Activation</b>	Institutional skills ecosystem established	Presidency / DPWI / DHET / dtic	National training framework implemented	Skills pipelines completed	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>SMME &amp; DFI Investment</b>	Integrated DFI governance under National Council	dtic / NEF / IDC / SEFA	DFI coordination streamlined	Capital flow efficient	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Provincial Industrial Parks</b>	Functional industrial clusters supporting exports	Provincial Govts / dtic / IDC	50,000 jobs created	Exports diversified	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>US Tariffs &amp; CBAM</b>	Diversified export portfolio & trade alliances	dtic / DIRCO / ITAC	Resilient export sectors	New BRICS+ markets	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	
<b>Budget Strategy</b>	25% GDP investment target achieved	NT / Presidency / DBSA / Parliament	Coherent macro policy alignment	Target met	<input type="checkbox"/> On Track <input type="checkbox"/> Delayed	

### 3. Monitoring Dashboard Framework

Indicator Type	Definition	Source of Verification	Frequency	Responsible Entity
<b>Input Indicators</b>	Resources allocated (budget, personnel, capacity)	Treasury & DFI reports	Quarterly	NT / ETC
<b>Process Indicators</b>	Activities initiated (policy drafts, training, legislation)	Departmental submissions	Quarterly	Lead Ministries
<b>Output Indicators</b>	Deliverables completed (projects, tariffs, training)	Monitoring dashboards	Quarterly	ETC Secretariat
<b>Outcome Indicators</b>	Results achieved (jobs, growth, investment)	NEC performance report	Annual	Presidency / DPME

### 4. Summary Scorecard Template

Pillar	Total Targets	Targets Met	Progress %	Rating	Remarks
<b>Energy Security &amp; Transition</b>	10	8	80%	☑ Good	Grid expansion advancing well

<b>Industrialization &amp; Trade</b>	8	6	75%	☑ Good	AfCFTA corridors operational
<b>Infrastructure &amp; Logistics</b>	6	4	67%	☑ Moderate	Transnet recovery ongoing
<b>Financial Sector Alignment</b>	5	3	60%	☑ Needs Attention	State Bank pending legislation
<b>Land &amp; Agriculture</b>	5	4	80%	☑ Good	Agro-industrial parks on track
<b>Innovation &amp; R&amp;D</b>	4	3	75%	☑ Good	Innovation hubs in progress

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# ANC 5TH NGC DOCUMENTS



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Thank You



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“  
**The year of Renewal to make the ANC a more effective instrument of the people to achieve the vision of the Freedom Charter:  
The people shall govern! The people shall share in the country's wealth!**  
”



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