

THE SAPOA ANNUAL CONVENTION & PROPERTY EXHIBITION

*Challenging Times,
Understanding the Issues,
Planning the Future!*



SAPOA



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Control Risks

20 June 2019

South Africa vs the Globe

July 2018

Control Risks



► Introduction to Control Risks

Control Risks is a specialist risk consultancy that helps create secure, compliant and resilient organisations. We believe that taking risks is essential to success, so we provide the insight and intelligence you need to realise opportunities and grow. And we ensure you are prepared to resolve issues and crises. From the boardroom to the most remote location, we have an unparalleled ability to bring order to chaos and reassurance to anxiety.



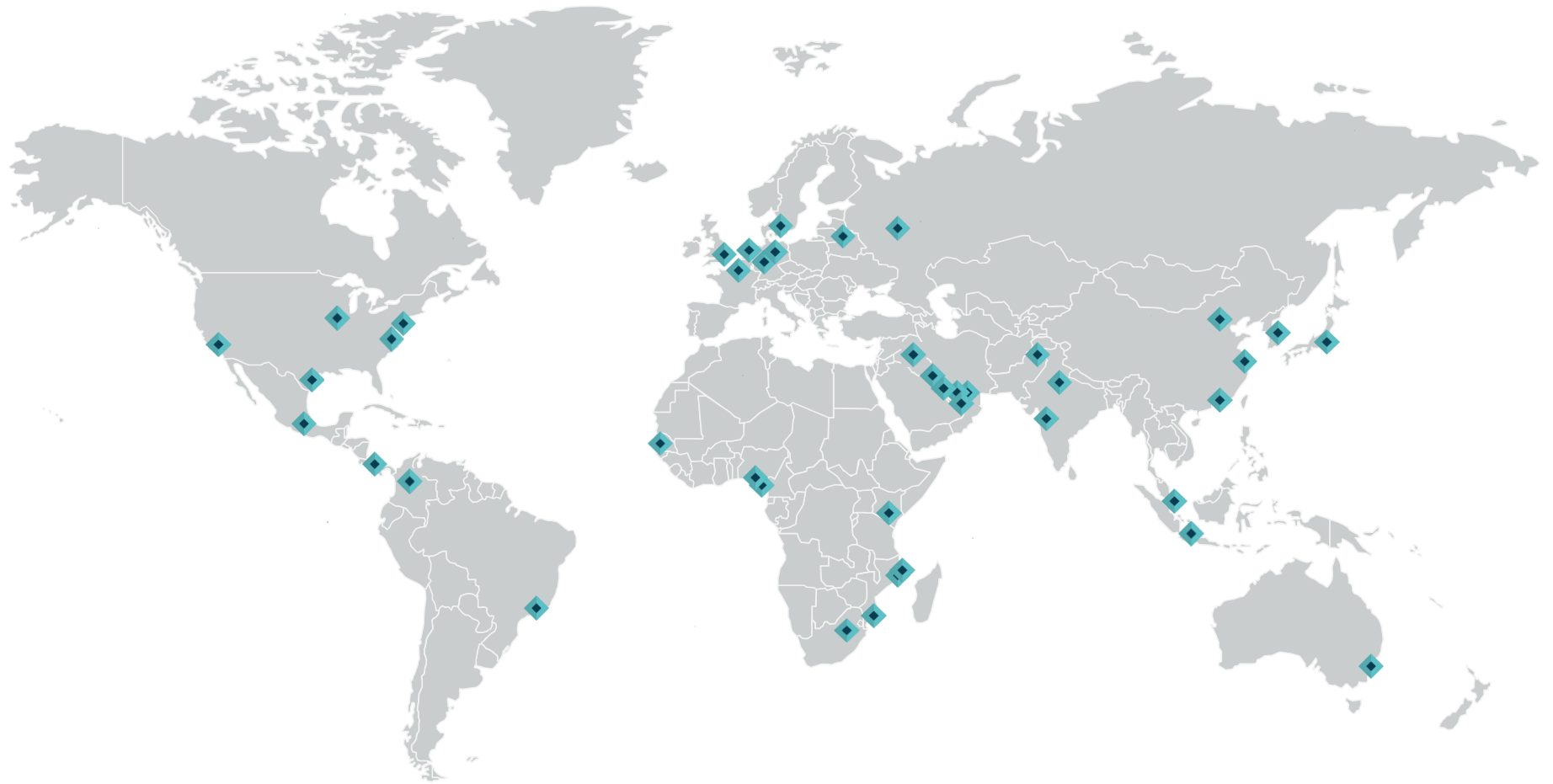
**Creating secure
and resilient
organisations**



**Resolving
critical issues
and crises**



**Delivering
growth and
opportunity**





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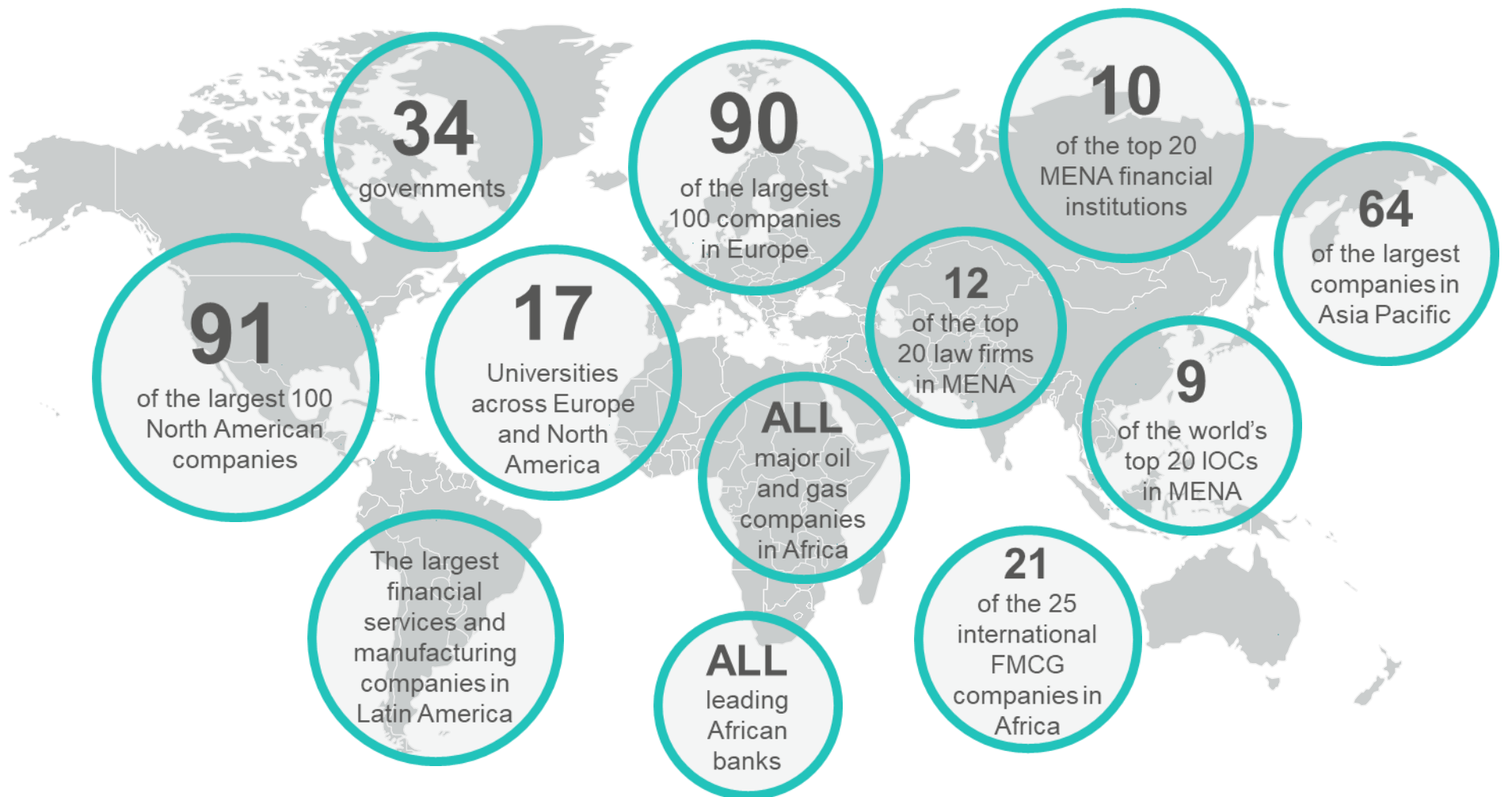
Creating secure and resilient organisations



Resolving critical issues and crises



Delivering growth and opportunity





▶ Africa vs the globe

Africa is on the path to recovery, driven by both internal and external factors.

Internal

- ▶ Dramatic political developments over the past few years have brought in new leaders with ambitious reform agendas.
- ▶ Increasing intra-Africa competition and growing electoral pressure have driven legislative and regulatory improvements.

External

- ▶ Geopolitical competition in Africa has ramped up in recent years, which poses challenges but can be exploited by savvy governments.
- ▶ In terms of risk, Africa is looking like an increasingly attractive jurisdiction when compared to other global markets.

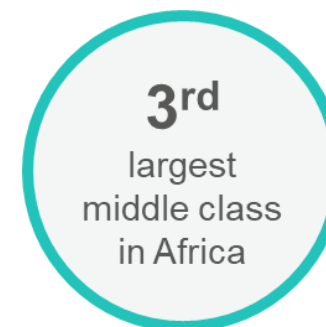
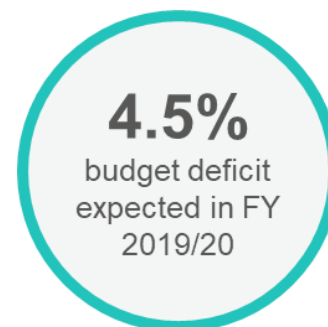
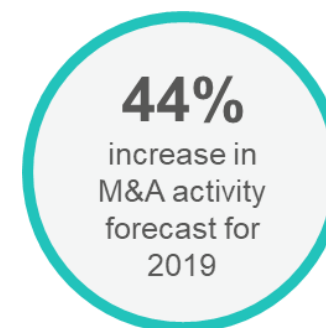




▶ South Africa in Africa

South Africa remains the most sophisticated large economy in Africa, but struggles to put forward a compelling narrative.

- ▶ Ramaphosa is not the only new African president with a reform agenda, but he has greater institutional capacity to enact reforms.
- ▶ Divisions within the ANC are likely to delay resolutions to controversial policy issues, especially before the 2022 elective congress.
- ▶ The Zuma era highlighted the deficiencies of South African institutions, but should also reassure investors of their strengths.
- ▶ South Africa remains unmatched in terms of infrastructure, density of companies and depth of financial markets.





▶ The Africa Risk-Reward Index

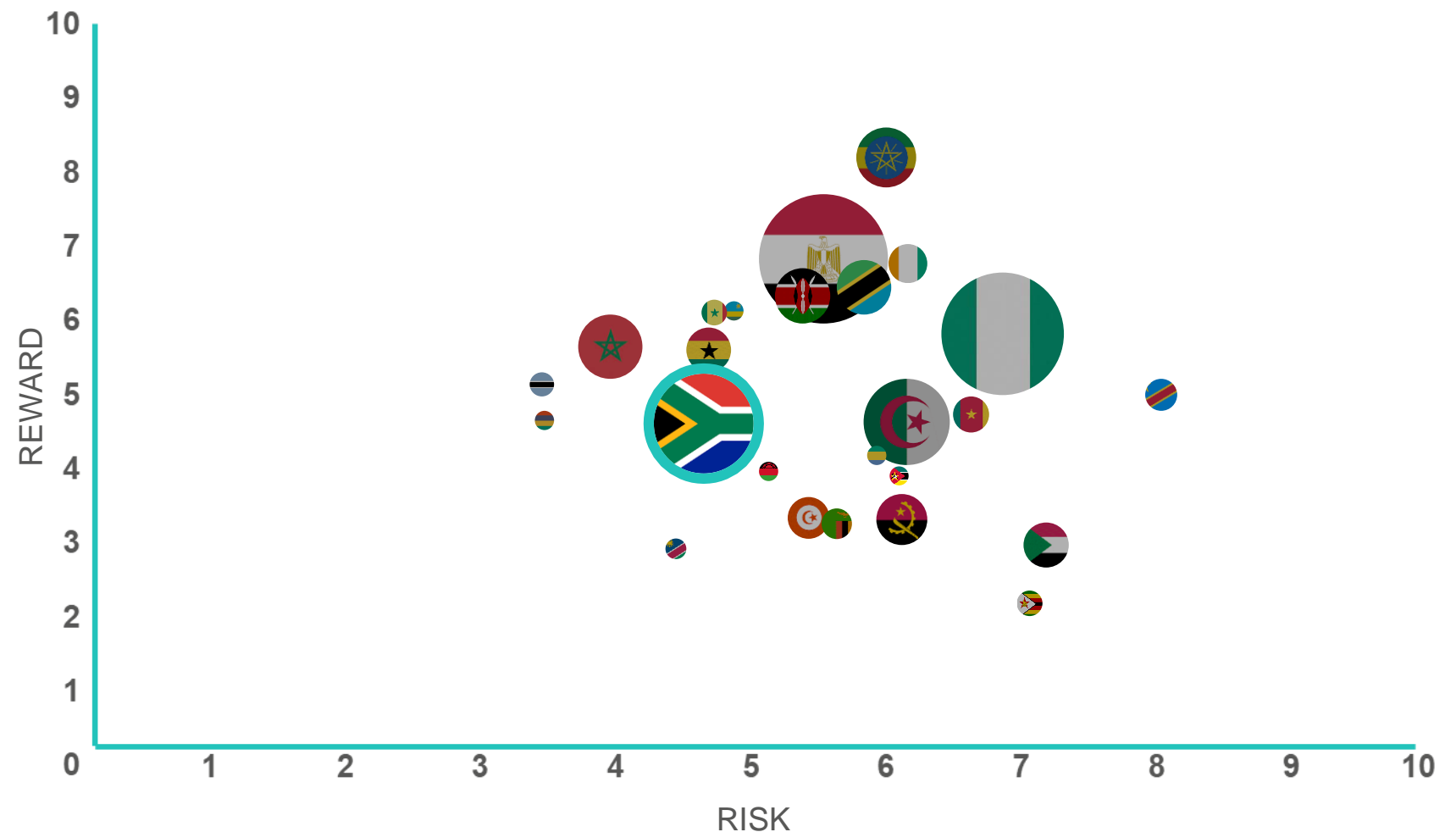
The Africa Risk-Reward Index plots each country's performance relative to African peers and highlights how some of Africa's largest economies are outshone by smaller rivals.

Risk indicators

- ▶ Political stability
- ▶ Social cohesion
- ▶ International relations
- ▶ Business environment
- ▶ Security environment
- ▶ Ideology and policy
- ▶ Credit risk
- ▶ Trade risk
- ▶ Exchange risk
- ▶ Market demand risk
- ▶ Market cost risk

Reward indicators

- ▶ Size and growth forecasts
- ▶ Demographic information
 - Rates of urbanisation
 - Dependency ratios
- ▶ Structure of the economy
 - Debt metrics
 - Current account
 - Banking sector stability
 - Investment flows



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