

ANALYSIS- SONA 2020- What are Ramaphosa's limitations?

As President Cyril Ramaphosa walks, or rather strides, to the podium on Thursday evening in the National Assembly, he will know that this must be one of the most important State of the Nation Addresses in several years. Wherever you look, there is a crisis.

, and the fact that Ramaphosa was an important factor in the ANC's election victory indicates he has some pull at his disposal . And the fact that Jacob Zuma is reduced to sending sick notes to court suggests the former president is running out of options and possibly no longer an immediate threat. New information about Ramaphosa's this week in Daily Maverick shows that he has not gone backwards. Considering the ever-worsening situation in South Africa, that is a major political achievement. Walking hard, getting nowhere — but Ramaphosa still enjoys a 62% approval level But the internal lock on economic policy still remains — the one that has held the ANC and SA's economy in stasis for at least 10 years. The left of the party is able to stop major economic reforms, while the business-friendly wing is not powerful enough to take the necessary action. And for Ramaphosa, the left, in the form of Cosatu and the SACP, are important supporters; even if he wants to make changes it could be dangerous for him to step too far. Then there are huge governance problems that have become so difficult to unravel that the best will in the world will not achieve any outcome. Eskom and electricity is but one example. Education is another. Despite all the money poured into schools, educational outcomes remain debilitatingly poor. Local-level governance remains a disaster, with people across South Africa lamenting the poor state of municipal infrastructure, while a vanishingly small number of municipalities are able to manage their finances properly. And the government has run out of money. It cannot bail out SAA or Eskom or any other entity anymore. Lovely. Just lovely. The most urgent crisis facing the nation concerns Eskom and the fact that it cannot produce enough electricity to avoid load shedding (Wednesday 12 February 2020 was the first day in nearly two weeks without some areas being switched off). But Eskom has a brand new CEO; Ramaphosa now needs to come with an announcement to make us forget all previous SONA announcements. That will not be easy. There are many who would like him to put flesh on the bones of the announcement by Minister of Mineral Resources and Energy Gwede Mantashe last week, that companies will be allowed to produce their own electricity without a licence. Ramaphosa could make a move in this direction. It is difficult to see who in the ANC would oppose it, and unlike almost any other options, it won't cost the government anything in the shorter term. However, there may be legal issues, in that that the process involves the energy regulator Nersa. As an independent body, it cannot be leaned on to suddenly allow companies to do what they want and legislation may be needed to free-up/incentivise the private sector to produce electricity on their own. Ramaphosa could battle to give any kind of timeline to real changes that have not already been announced by Mantashe. At the start of the week, it appeared likely that his speech would contain an announcement that pension funds held by the Public Investment Corporation would be used to pay back about half of Eskom's debt. This was proposed by Cosatu. But Cosatu now appears to be dialling back on its own proposal. It should be noted here that the only people from Cosatu who spoke about this in public were both appointees, its spokesperson Sizwe Pamla and its parliamentary officer, Matthew Parks. Neither of them have to ever face an election. The first Cosatu person to dial back this proposal was its elected general secretary, Bheki Ntshalintshali. The opposition was also growing from other unions (Fedusa and the Public Servants Association have publicly opposed it) and banks. The interim board of the PIC is also likely to fight this . After Zuma took over the Presidency in 2009 he, as did previous presidents, made certain promises during his annual speech. Media organisations would wait a year and then evaluate whether those promises had been kept. Mostly, they hadn't. That led to new speeches that contained no promises (or very few). Being a canny politician, Ramaphosa may follow that trend. He knows that keeping promises

has become increasingly difficult, and he has to be careful about saying certain things will happen when they cannot. Despite the demands and hopes of many, and the sense of impending doom among some, the safer course for Ramaphosa would be to promise very little. However, there may be a silver lining, at least for those in Gauteng. In 2019, Transport Minister Fikile Mbalula claimed that a solution was in the offing for the e-tolls saga. The deadlines that he promised came and went (as deadlines sometimes do around Fikile Mbalula). Ramaphosa may feel that the time has come to bring an end to this matter. The crisis that South Africa faces is both economic and political. The political situation appears to have not changed enough to allow the economic situation to improve. Ramaphosa seems to be not strong enough, or daring enough, and the balance of power too fine for any major change to come now. But South African politics is nothing if not surprising. Anything can happen on Thursday night. Even something as unexpected.